Leicester and Leicestershire HMA Employment Land Study

A report prepared by

PACEC

With Warwick Business Management Ltd
on behalf of
Leicester Shire Economic Partnership

PACEC

Public and Corporate
Economic Consultants
www.pacec.co.uk

49-53 Regent Street
Cambridge CB2 1AB
Tel: 01223 311649
Fax: 01223 362913

504 Linen Hall
162-168 Regent Street
London W1R 5TB
Tel: 020 7734 6699
Fax: 020 7434 0357

e-mail: admin@pacec.co.uk

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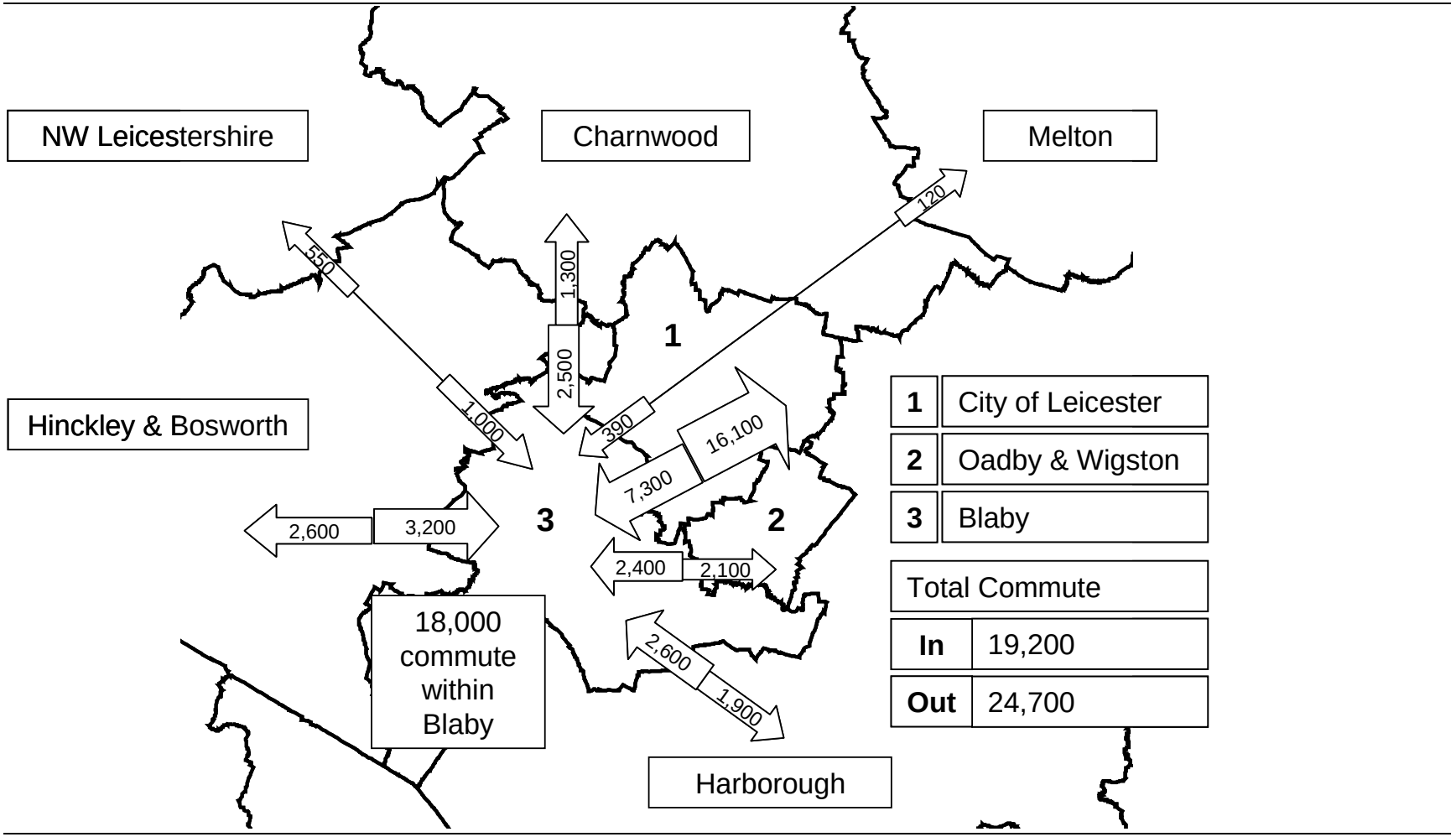
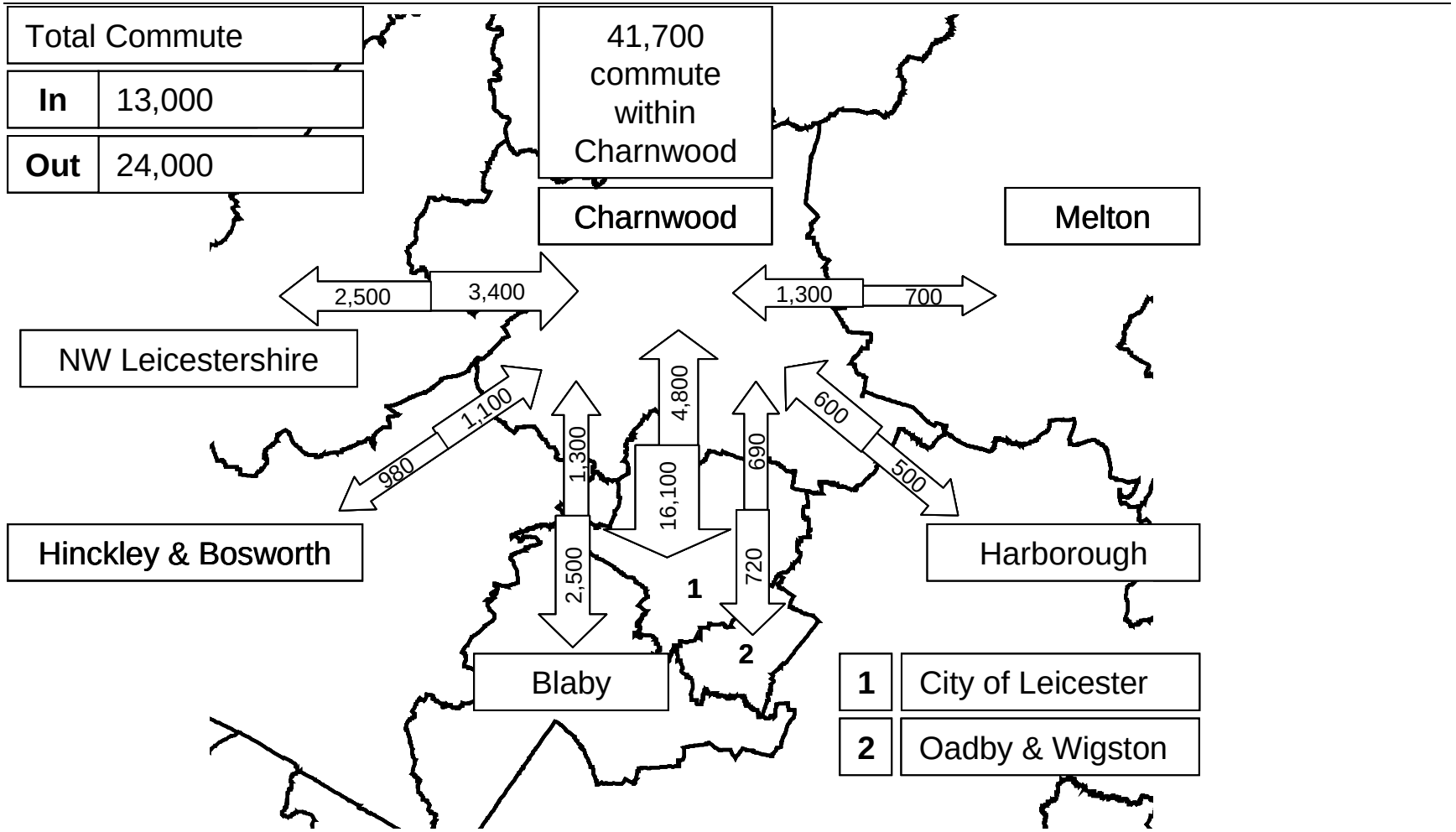


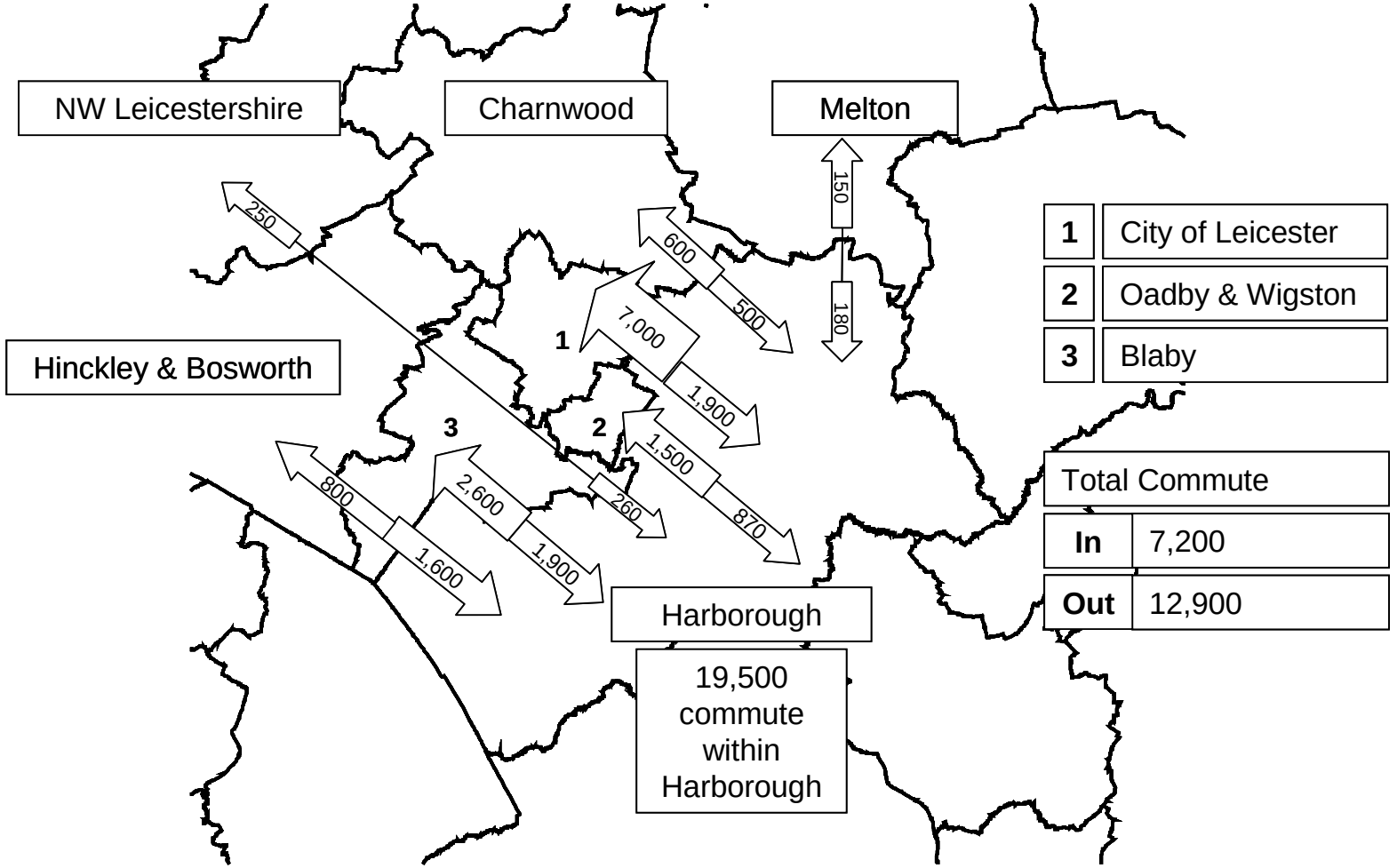
Source: Census 2001

Figure A1.2 Charnwood Commuter Flow



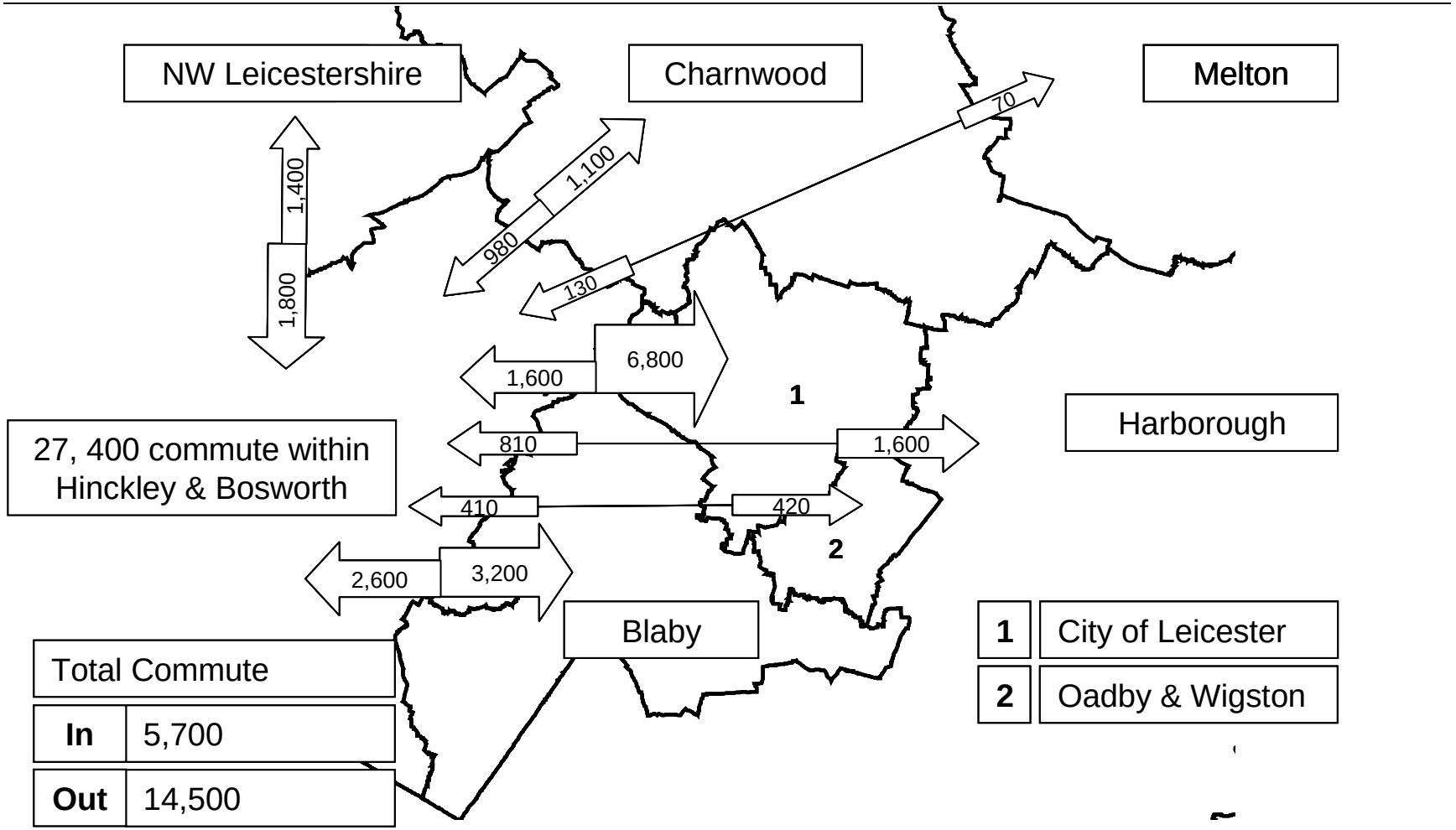
Source: Census 2001

Figure A1.3 Harborough Commuter Flow



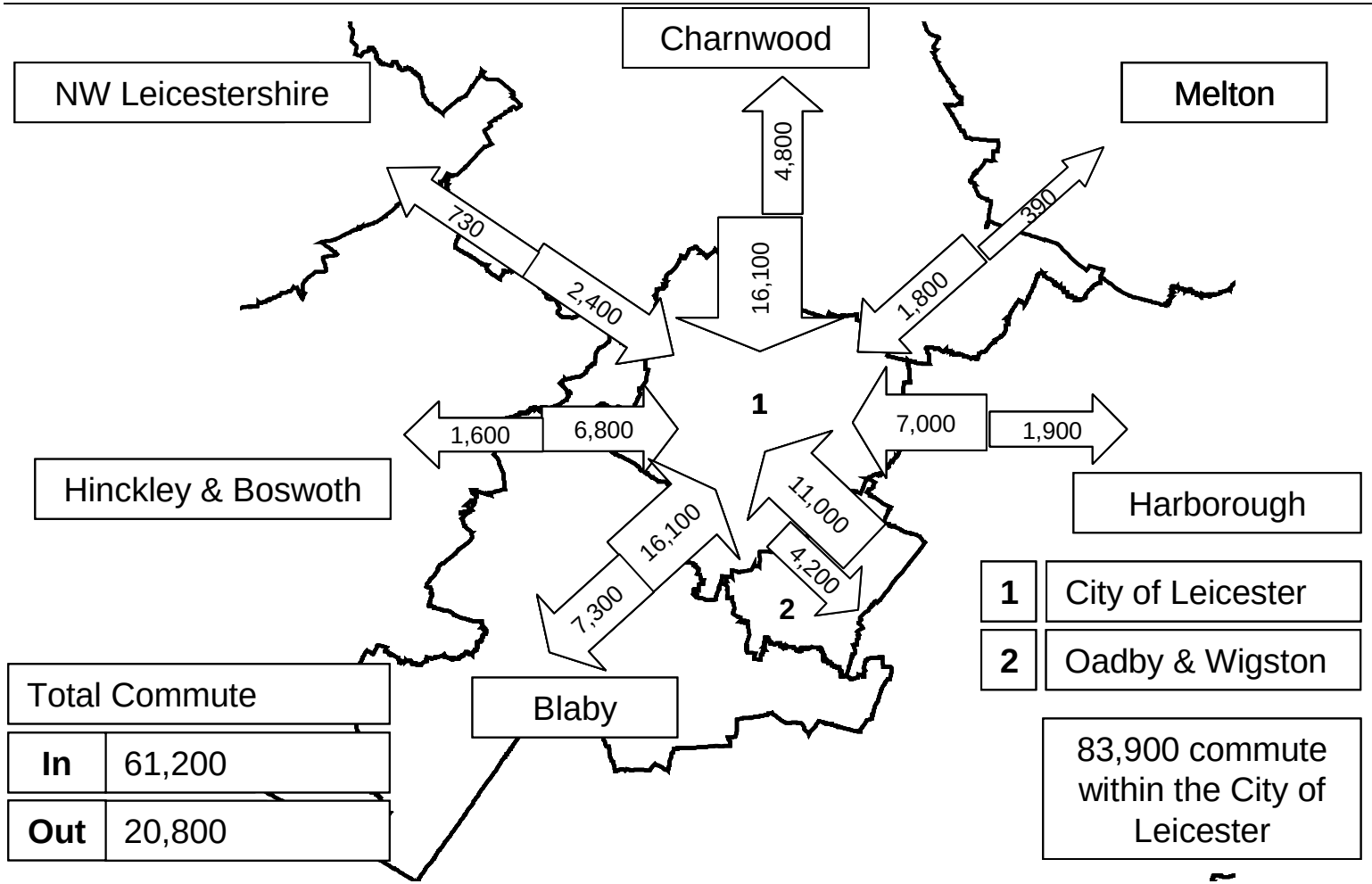
Source: Census 2001

Figure A1.4 Hinckley and Bosworth Commuter Flow



Source: Census 2001

Figure A1.5 Leicester Commuter Flow



Source: Census 2001

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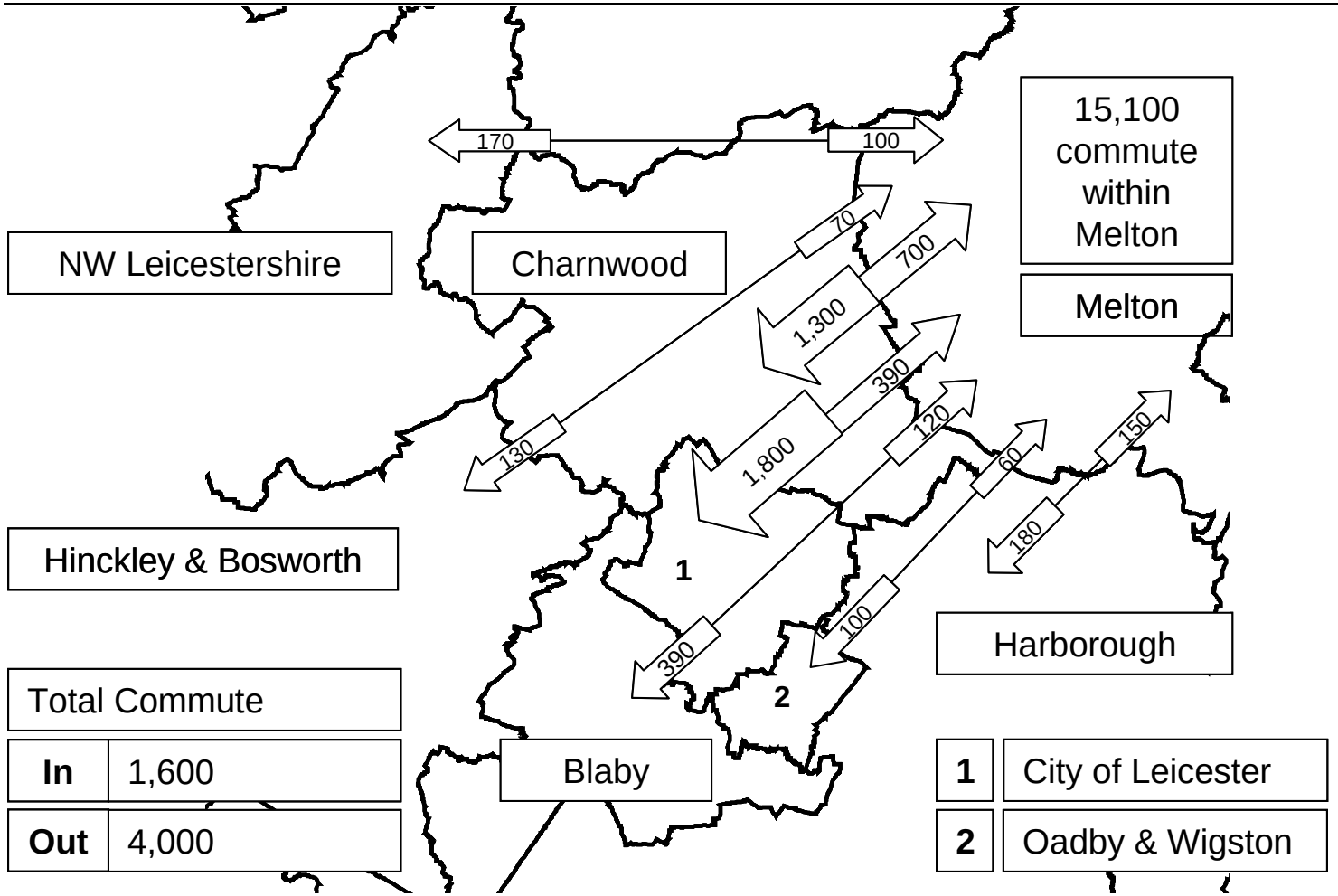
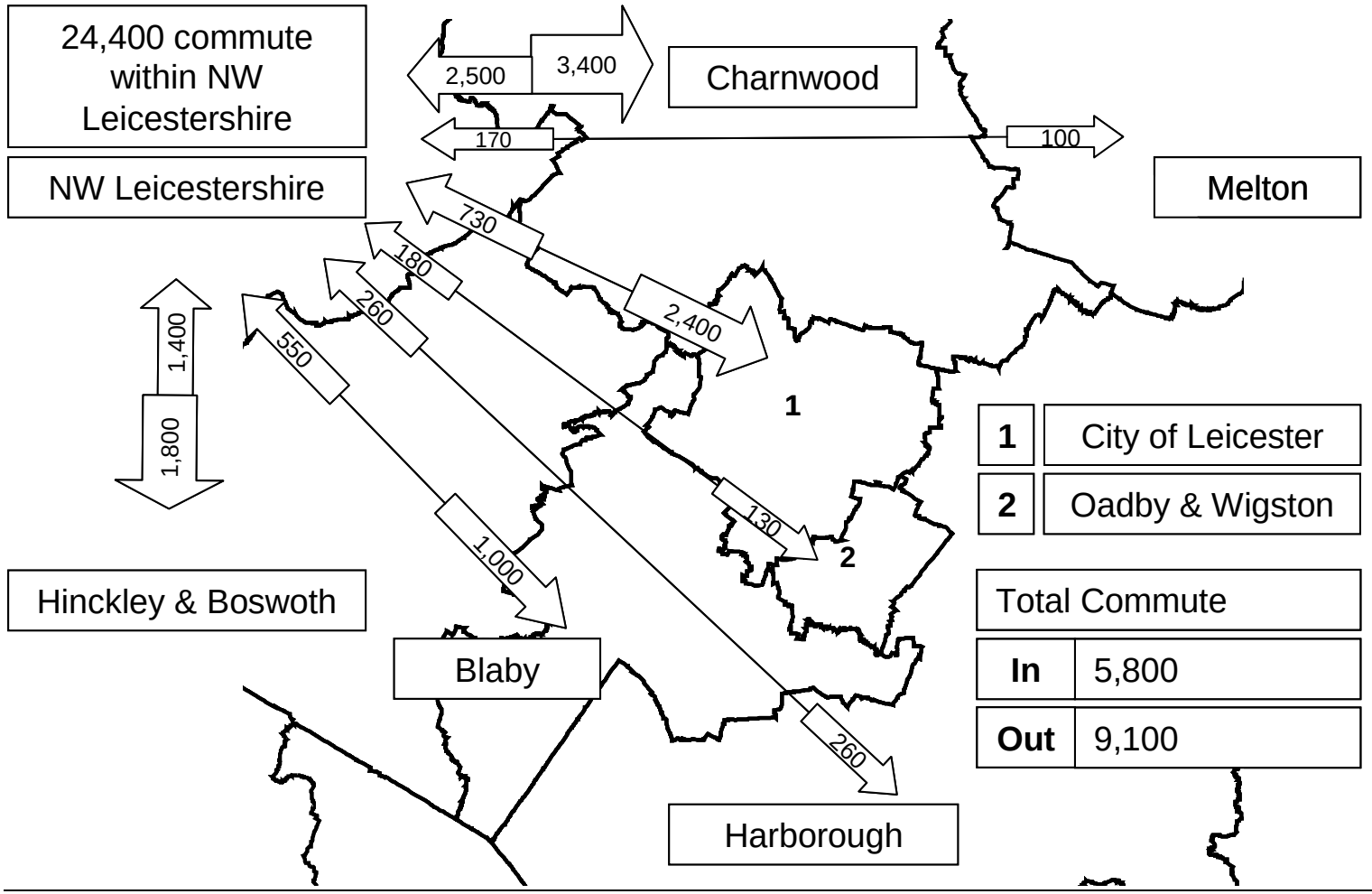


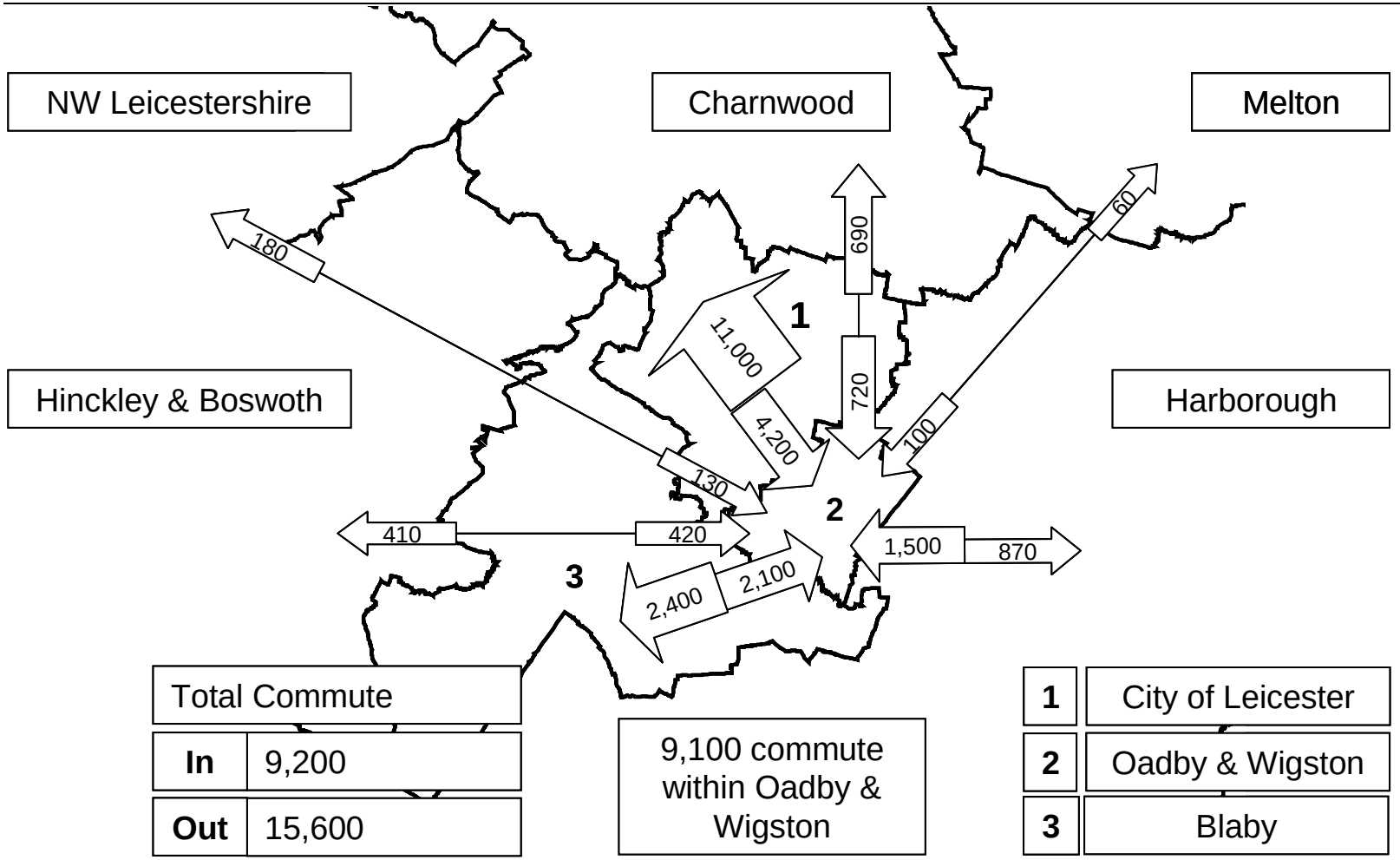
Source: Census 2001

Figure A1.7 North West Leicestershire Commuter Flow



Source: Census 2001

Figure A1.8 Oadby and Wigston Commuter Flow



Source: Census 2001

Appendix B Employment Sector Definitions

	SIC
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• Motor vehicle repair	50.2
• Waste treatment	90
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• Warehouse & freight forward	63(bar .3)
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• Courier	64.12
• Renting: construction equipment	71.32
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• Taxi, freight & pipeline (part)	60.2,3

Appendix C Floorspace Definitions

C1 ODPM Floorspace Definitions up to 2004

Table B.4: **Main primary descriptions located in the bulk classes**

Retail premises		Offices		Factories		Warehouses	
Code	Primary description	Code	Primary description	Code	Primary description	Code	Primary description
CG3	Car showroom	CO	Office	CG1	Vehicle repair	CG4	Road Haulage
				CG2	Garage		
CL1	Wine bar	CO1	Computer centre	CG3	Car showroom	CW	Warehouse
CL2	Club (social)			CG4	Road haulage	CW2	Storage depot
		MH	Surgery			CW3	Store
CR	Restaurant	MH1	Health centre				
CR1	Café			IF	Factory		
CR2	Food court	ML	Office (local govt)	IF1	Mill		
				IF2	Works		
CS	Shop	MP	Police station	IF3	Workshop		
CS1	Bank			IF4	Business Unit		
CS2	Betting shop						
CS3	Hairdressing			MS1	Fire station		
CS4	Kiosk			MS2	Ambulance station		
CS5	Laundrette						
CS6	Post office						
CS7	Showroom						
CS8	Hypermarket						
CS9	Superstore						
CS10	Retail warehouse						
LT1	Amusement arcade						

C2 ODPM Floorspace Definition 2005 onwards

Table A.2: Bulk and non-bulk hereditaments: England and Wales, 1st April 2005

Bulk class	Description	Special category codes	Primary descriptions	Building use type
Retail premises	Premises that provide 'off-street' goods and services to the public. They include supermarkets, corner shops, local post offices, restaurant, cafes, launderettes and many others. Public houses and hotels are classed as non-bulk.	Shops	Shop	Shop – standard unit
		Shops	Shop	Shop – not elsewhere specified
		Shops	Shop	Shop – corner shop/small units non-retail area
		Hairdressing/Beauty Salons	Hairdressing Salon	Shop – standard unit
		Restaurants	Restaurant	Shop – standard unit
Offices	These include purpose-built office buildings, offices over shops, light storage facilities and light industrial activities. Larger banks, building societies and post offices containing substantial office space may be included in this class, rather than in the retail bulk class.	Offices (including computer centres)	Offices	Offices – purpose built
		Offices (including computer centres)	Offices	Offices – converted from residential
		Offices (including computer centres)	Offices	Offices – converted from other commercial
		Offices (including computer centres)	Offices	Offices – over shops
		Offices (including computer centres)	Offices	Offices – converted from factory/workshop
Factories	These range from small workshops to very large manufacturing units. Some industrial hereditaments where the rateable value is not primarily derived from floorspace (for example iron and steel plants) are classed as non-bulk.	Factories, workshops and warehouses (inc bakeries and dairies)	Workshops	Factory/workshop – purpose built
		Factories, workshops and warehouses (inc bakeries and dairies)	Workshops	Factory/workshop – converted
		Factories, workshops and warehouses (inc bakeries and dairies)	Factory	Factory/workshop – purpose built
		Vehicle repair workshops and garages	Vehicle Repair Workshop	Factory/workshop – purpose built
		Factories, workshops and warehouses (inc bakeries and dairies)	Workshops	Factory/workshop – not elsewhere specified
Warehouses	These range from small storage units and depots to very large distribution warehouses. It also now includes virtually all car showrooms.	Factories, workshops and warehouses (inc bakeries and dairies)	Warehouse	Warehouse/store – purpose built
		Stores	Store	Warehouse/store – land used for storage
		Factories, workshops and warehouses (inc bakeries and dairies)	Warehouse	Warehouse/store – converted
		Factories, workshops and warehouses (inc bakeries and dairies)	Warehouse	Factory/workshop – purpose built
		Car showrooms	Car Showroom	–

continued

Table A.2: **Bulk and non-bulk hereditaments: England and Wales, 1st April 2005 (*cont'd*)**

Other bulk premises	A new classification for 2005 that includes mainly 'community' type establishments such as community centres, village halls and social clubs. Building use types are generally not available for this bulk class.	Village halls, scout huts, cadet huts etc	Hall	–
		Clubs and institutions	Social Club	–
		Community day centres	Community Centre	–
		Day nurseries/play schools	Day nursery	–
		Clubhouses	Clubhouse	–
Non-bulk	The non-bulk group includes all hereditaments that would not appear in the other bulk class groups above. This would include premises such as car parks, sport and leisure facilities, public houses and public facilities such as schools, hospitals, museums and libraries. Building use types are generally not available for non-bulk hereditaments.	Public houses/pub restaurants	Public House	–
		Advertising rights/stations	Advertising Right	–
		Car spaces	Car Parking Space	–
		Local authority schools	School	–
		Holiday homes self catering	Self-catering Unit	–

Source: ODPM (2006): Commercial and Industrial Floorspace and Rateable Value Statistics, 2005 (2005 revaluation

Appendix D Outstanding Planning Permissions and Allocations, March 2007

Table D1.1 Leicester City's outstanding planning permissions and allocations, March 2007

Site	Offices/ Science Park	Open/Industrial	Strategic Warehousing	Permission/ Allocation/ Windfall
Gipsy Lane, Brickworks, Victoria Road East		2.1		A
Abbey Meadows Science and Technology Park Phases 1 and 2	44,000 (SP)			P
Gipsy Lane Brickworks, Victoria Road East		3.0		P
Mountain, Road/Barkbythorpe Road, Troon Industrial Area		2.1		A
Syston Street East, Humberstone Sidings		1.3		A
Lewisher Road		2.4		P
Trevanth Road, unit 1		Small		P
Ashton Business Park (Bursom), Hoods Close		2.1		A
Barkby Road		1.4		A
Uxbridge Road, Land to the south		1.2		A
Harrington Street & Ulverscroft Road		0.6		A
Nedham Street, Lesta Packaging plc		0.5		P
Sanvey Gate (adj.Joiners Arms PH)		0.4		A
Langham Road		0.4		A
Waterside Road, Hamilton Industrial Park		0.4		A
Gorse Hill, Boston Road, Gorse Hill Industrial Estate Part Plot 4		0.3		A
Conduit Street, Fara estates	760			P
Langham Road		0.2		P
Humberstone Road, Nedham Street		0.2		P
Sanvey Gate, Adjacent 25 Pasture lane		0.1		A
Fairway Business Park		6.0		W
NBQ Phase 1	47,200			P
Total	*91,960*	*24.7*	*0.0*	

Source: Leicester City Council, PACEC

Table D1.2 Blaby's outstanding planning permissions and allocations, March 2007

Site	Offices/ Science Park	Open/Industrial	Strategic Warehousing	Permission/ Allocation/ Windfall
Grove Business & Distribution Park, Enderby; Woodlands, Phase 2, Plot 1; Barnsdale Way/Thorpe Way	16,700			P
Quarry Lane, Enderby		3.6		A
Carlton Park, Narborough	35,480			P
Kirby Park Farm, Ratby Lane, Kirby Muxloe	9,520			P
Warrens Industrial Estate, Mill Hill Industrial Estate, Enderby		0.6		A
Land adjacent Couture Marketing, Station Road, Stoney Stanton		0.7		P
Highfields Enterprise Zone, Stoney Stanton		0.1		A
Whetstone Pastures Farm, Whetstone		0.5		P
Feldspar Close, Plot E unit 2, Warrens Industrial Area		0.5		P
Total	*61,700*	*6.0*	*0.0*	

Source: Blaby District Council, PACEC

Table D1.3 Charnwood's outstanding planning permissions and allocations, March 2007

Site	Offices/ Science Park	Open/Industrial	Strategic Warehousing	Permission/ Allocation/ Windfall
Burder Street Regeneration, Loughborough		0.9		P
Science Park, Ashby Road, Loughborough	43,000 (SP)			P
Pontylure Farm (Watermead Business Park), Syston	21,600			P
Harrowgate Drive (Hallamfields), Birstall		6.0		P
251 Loughborough Road (Granite Way), Mountsorrel		1.2		P
North Road, Loughborough		0.5		P
Land at Dishley Grange, Hathern	3,700	19.1		A
The Warren, East Goscote		4.8		P
Loughborough Industrial Park, Weldon Road, Loughborough		3.4		P
Rothley Lodge		5.9		P
Total	*68,300*	*41.8*	*0.0*	

Source: Charnwood Borough Council, PACEC

Table D1.4 Oadby & Wigston outstanding planning permissions and allocations, March 2007

Site	Offices/ Science Park	Open/Industrial	Strategic Warehousing	Permission/ Allocation/ Windfall
Wigston Railway Triangle		3.1		A
Sports field off Tiger's Road, South Wigston		0.8		P
Land West of Magna Road, Magna Industrial Estate		0.6		A
Total	*0.0*	*4.5*	*0.0*	

Source: Oadby & Wigston Borough Council, PACEC

Table D1.5 Harborough's outstanding planning permissions and allocations, March 2007

Site	Offices/ Science Park	Open/Industrial	Strategic Warehousing	Permission/ Allocation/. Windfall
Land at Sutton Farm, Leicester Road		0.3		P
Bruntingthorpe Industrial Estate		0.1		P
Land off Marlborough Drive, Fleckney		0.7		P
Land at Gate House Lane, Great Easton		1.0		P
Hope Farm, Main Street, Hungarton		0.4		P
Station Road, Husbands Bosworth		2.6		P
Sibertoft Road, Husbands Bosworth		0.3		P
Rear Site, Central Park, Leicester Street, Lutterworth	5,060			P
South of Coventry Road (Leaders Farm), Lutterworth	13,200			A
West of Northampton Road, Market Harborough		1.8		A
Former Tungstone Batteries Ltd, Lathkill Street, Market Harborough	5,840			P
Nursery Site, Riverside, Market Harborough		2.0		P
Riverside, Market Harborough		0.5		P
Airfield Farm, Leicester Road, Market Harborough	8,400	3.3	1.1	P
Kettering Road/ Rockingham Road, Market Harborough		0.3		P
East of Rockingham Road, Market Harborough ("Peaker Park")		4.9		P
East of Northampton Road, Market Harborough	34,818			
Bowden Business Village	172			
Railway Goods Yard, Rockingham Road		2.8		
Stanford Hall, Stanford Park		0.1		
Total	*67,490*	*21.1*	*1.1*	

Source: Harborough District Council, PACEC

Table D1.6 H&B's outstanding planning permissions and allocations, March 2007

Site	Offices/ Science Park	Open/Industrial	Strategic Warehousing	Permission/ Allocation/ Windfall
MIRA, Higham on the Hill		9.0		A
Land North of Coventry Road, Hinckley		4.7		P
Rear of Sketchley Works, Rugby Road, Hinckley		3.9		A
A5 Watling Street, Nutts Lane, Hinckley		2.3		P
Interlink Distribution Park, Stanton near Bardon			1.2	A
Rear Jarvis, Coventry Road, Hinckley		3.7		P
Wheatfield Way, Hinckley Fields Industrial Estate		0.3		P
Stephenson Road, Harrowbrook Industrial Estate, Hinckley		0.3		A
Barwell Business Centre, Barwell		0.4		P
Unit B, Warwick Buildings, Rossendale Road		0.1		P
Nailstone Colliery			20.0	W
Total	*0.0*	*24.8*	*21.2*	

Source: Hinckley & Bosworth Borough Council, PACEC

Table D1.7 Melton's outstanding planning permissions and allocations, March 2007

Site	Offices/ Science Park	Open/Industrial	Strategic Warehousing	Permission/ Allocation/ Windfall
Asfordby Business Park, Asfordby		16.0		A
Normanton Lane, Bottesford		0.7		A
Charlotte Street, Melton Mowbray		0.2		A
John O Gaunt Industrial Estate, Somerby		0.4		P
Holwell Works, Asfordby Hill		15.0		A
Pedigree Petfoods Ltd, Mill Road, Melton Mowbray		0.1		A
Leicester Road	8,920			W
Total	*8,920*	*32.4*	*0.0*	

Source: Melton Borough Council, PACEC

Table D1.8 NW Leicestershire's outstanding planning permissions and allocations, March 2007

Site	Offices/ Science Park	Open/Industrial	Strategic Warehousing	Permission/ Allocation/ Windfall
Ashby Business Park	12,760	3.9		P
Pegasus Business Park, East Midlands Airport	58,440			P
Willow Farm, Castle Donington	17,480			P
Extension to Westminster Estate, Measham		11.8		A
Site off Long Lane, Kegworth		1.1		A
Forest Business Park (also known as Bardon Lodge), Coalville		2.7		P
Whitwick Business Park		1.0		P
Stephenson Industrial Estate		2.7		P&A (different plots)
Langham Park, Castle Donington		1.7		P
Ivanhoe Business Park, Ashby	5,388	3.3	4.0	P&A (different plots)
Land at Swain Park, Albert Village		5.0		P&A (different plots)
East Midlands Distribution Centre (Previously Castle Donnington Power Station Site)			38.5	P
Interlink (also known as Battleflat)			14.0	P
Flagstaff 42		0.7		P
South of Tournament Way		0.5		P
Hilltop, Bardon		4.1		A
Bardon Hall, Coalville		0.8		P
Off Vulcan Way, Coalville		0.3		P
Off Citrus Grove, Kegworth		6.1		P
Spring Cottage/Former Rawdon Colliery, Moira		1.0		P
Moira Road, Woodville Woodlands		4.8		P
Stardust, Bardon	5,574			W
Total	*99,642*	*51.4*	*56.5*	

Source: North West Leicestershire District Council, PACEC

Appendix E Site Assessment of Employment Areas which remain Wholly or Partly Undeveloped

Market Attractiveness Factors					
	Score 1	**Score 2**	**Score 3**	**Score 4**	**Score 5**
Defines ownership issues	Site owned landowner(s) who are unwilling to either sell or develop or subject to ransom strips	Site subject to long term site assembly problem	Some land ownership issues but subject to negotiation by willing parties	Single owner with minor legal issues, for example unsigned S 106 agreement	Public or private owners with developer committed to early development
Defines on site constraints	Severe land contamination and or ground stability issues	Problematic land contamination and or ground stability issues	Some land remediation required	Minor land remediation required	No land remediation required
Defines utility infrastructure constraints: Water, sewage, drainage, electricity, gas and broadband	Site subject to development embargo due to costs of increasing capacity	Substantial off and on site infrastructure improvements required	Some infrastructure improvements required	Capacity constraints defined, costed and affordable	No constraints on capacity
Defines highway infrastructure constraints	Capacity constraints on site access, subject to Transport Assessment	Substantial off site highway capacity improvements required	Some additional highway improvement works required	Usual site access and service road(s) required	Site access in place
Defines potential and current market interest in the site for B1, 2 or 8 uses	Site subject of recent planning application(s)	Site subject of active marketing for employment development	Site subject of either recent funding, land sale or pre let deal	Site clearance and preparation either completed or underway	Development either recently completed or under construction on part of the site

Sustainable Development Factors					
	Score 1	**Score 2**	**Score 3**	**Score 4**	**Score 5**
Defines flood risk	EA map predicts more than 50% of site at 1 in 100 risk	EA map predicts less than 50% of site at 1 in 100 risk	EA map predicts more than 50% of site at 1 in 1000 risk	EA map predicts less than 50% of site at 1 in 1000 risk	EA map predicts no risk
Defines accessibility by foot and cycle	No footways or cycles paths linking substantial residential areas with the site	Uncoordinated footways and cycle paths that do not conveniently link with residential areas or may be subject of safety issues	One basic footway and cycle path between a residential area and the site	Two safe and well maintained footways and cycle paths between residential areas and the site	Three or more safe and well maintained footways and cycle paths between residential areas and the site
Defines accessibility by public transport	No bus stops or railway station within 800 m of the site	Bus or train frequency for all stops within 800 m is less than hourly, ie 12 scheduled calls between 06.00 – 18.00 Monday to Saturdays	Bus or train frequency for all stops within 800 m is hourly ie 13 scheduled calls between 06.00 – 18.00 Monday to Saturdays	Bus frequency for all stops within 800 m is half hourly ie 26 scheduled calls between 06.00 – 18.00 Monday to Saturdays	a) Bus frequency for all stops within 800 m is 15 minutes or more ie 56 or more scheduled calls between 06.00 – 18.00 Monday to Saturdays
Defines accessibility to local facilities	No facilities within 800 metres	Small shopping parade within 800 metres	Local centre within 800 metres	District or town centre within 800 metres	District or town centre within 600 metres
Defines easy and appropriate accessibility to highway network	Access by HGVs subject to restrictions and need for inconvenient alternative routes	Access by cars and HGVs generates unacceptable environmental impacts on residential areas, congestion and air quality	Access by cars and HGVs generates some environmental impacts on residential areas, congestion and air quality	Access by cars and HGVs accommodated on appropriate A and Trunk roads	B 8: Linked to rail and motorway access

Strategic Planning Factors					
	Score 1	**Score 2**	**Score 3**	**Score 4**	**Score 5**
Defines site's strategic importance to the delivery of the RSS/ RES	Site is not located in an area of strategic importance		Site is located adjacent to an area of strategic importance		Site is located in an areas of strategic importance
Is the site identified or likely to be required for a specific use or specialist use	Sites is unlikely to be required for either a specific or specialist use				Site is reserved for a specific use, for example planned expansion of firm or specialist use, e.g. a Science Park
Is the site part of a comprehensive development proposal which depends on the site being partly or wholly developed for employment user	No				Yes
Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on – site constraints to make employment development viable?	No		Funding support is being considered		Funding is committed as a strategic priority

Appendix F Floorspace Densities

F1 Strategic Warehousing

F1.1 The East Midlands Strategic Distribution Study explores the amount of floorspace required per worker. The table below summarises the estimates of floorspace per worker from 4 separate surveys.

Table F1.1 Estimates of floorspace requirements for strategic distribution

	sq.m. per worker
King Sturge – survey of 45 strategic distribution units of >10,000 sq.m.	95
Savills – 100 warehouses in the West Midlands	84
Pro Logis – 32 units of >10,000 sq.m.	95
RTP estimates (below)	88

Source: East Midlands Strategic Distribution Study

F1.2 The estimates made by RTP are based on DCLG Commercial Floor Space statistics and employment estimates from the Annual Business Inquiry, taken at middle layer strategic output area.

Table F1.2 Estimation of employment densities in strategic distribution parks

	Floor space (sq.m.)	Number employees	sq.m. per worker
The Garden Shed	46,000	1,600	28
Oliver Road and Pro Logis Park	364,000	4,600	79
Euro Hub Freight Park	394,000	4,600	85
Dove Valley Park	45,000	700	69
Interlink	100,000	1,350	74
DIRFT Logistics Park	210,000	1,500	140
Total	*1,264,000*	*14,385*	*88*

Source: East Midlands Strategic Distribution Study: RTP; DCLG Commercial and Industrial Floor Space Statistics 2005; ABI 2004

F1.3 Overall, employment densities in large-scale warehouses are lower than other business uses, but there is considerable variation.

Appendix G Employment Forecasts to Land and Floorspace Estimates

Step One: Experian Forecasts

Total Employment

G1.1 Total employment is forecast to increase by 17,700 jobs across Leicestershire by 2016, and then a further, 7,000 jobs by 2026. The largest growth up to 2026 is forecast in Blaby (6,200 jobs), followed by North West Leicestershire (5,900 jobs). Only an additional 2,200 jobs are forecast in Leicester City (which shows a decline from 2016 levels of employment).

Table G1.1 Employment Forecasts, Total, 2007-2026, Jobs '000s

	2007	2016	2026	2007-2016	2007-2026
Blaby	51.5	54.5	57.8	3.0	6.2
Charnwood	69.5	70.4	70.6	0.9	1.0
Harborough	41.8	44.3	46.0	2.4	4.2
Hinckley & Bosworth	45.4	47.6	48.9	2.2	3.5
Melton	22.9	24.1	24.2	1.2	1.3
NW Leicestershire	55.1	59.1	61.0	4.1	5.9
Oadby & Wigston	20.2	20.5	20.6	0.2	0.3
Leicester City	180.2	183.9	182.4	3.8	2.2
PUA	*321.5*	*329.3*	*331.3*	*7.9*	*9.8*
HMA	*486.7*	*504.4*	*511.4*	*17.7*	*24.7*

NB. May not sum due to rounding.
Source: Experian; PACEC

Offices

G1.2 Table G1.2 sets out forecasts for employment increases in offices and Table G1.3 sets out forecasts for employment increases in offices plus public administration. Public administration may be included in offices as it tends to take up office space that otherwise may be taken by commercial office occupiers.

G1.3 In total across the HMA, office employment is forecast to increase by 14,200 jobs by 2026 (10,500 by 2016). If public administration is included, the forecast increase is lower, with 10,000 additional jobs by 2026 (8,300 by 2016). This is because across Leicestershire and Leicester City, employment in public administration is forecast to decline. We show here office and public administration employment compared to just offices to demonstrate the effect of including public administration. In later steps of the forecast, we show just offices and public administration (to be consistent with other work across the region e.g. EMLPS).

G1.4 The largest forecasts in office employment are set out in Leicester City, with an additional 7,200 jobs by 2026 (2,900 if public administration is included).

This is followed by Harborough (1,800 jobs), Hinckley & Bosworth (1,400 jobs) and Blaby (1,300 jobs).

Table G1.2 Employment Forecasts, Offices, 2007-2026, Jobs '000s

	2007	2016	2026	2007-2016	2007-2026
Blaby	9.2	10.0	10.5	0.8	1.3
Charnwood	10.5	11.4	11.4	0.8	0.9
Harborough	7.7	8.8	9.4	1.2	1.8
Hinckley & Bosworth	8.0	8.8	9.5	0.7	1.4
Melton	3.8	4.1	4.1	0.3	0.4
NW Leicestershire	7.7	8.3	8.5	0.7	0.8
Oadby & Wigston	3.1	3.3	3.4	0.3	0.3
Leicester City	39.5	45.3	46.7	5.8	7.2
PUA	62.3	70.0	72.1	7.6	9.8
HMA	89.5	100.0	103.6	10.5	14.2

NB. May not sum due to rounding.
Source: Experian; PACEC

Table G1.3 Employment Forecasts, Offices and Public Administration, 2007-2026, Jobs '000s

	2007	2016	2026	2007-2016	2007-2026
Blaby	14.6	15.5	15.8	0.9	1.2
Charnwood	12.4	13.0	12.8	0.6	0.4
Harborough	8.6	10.0	10.6	1.4	2.0
Hinckley & Bosworth	8.9	9.7	10.3	0.9	1.5
Melton	4.1	4.4	4.3	0.2	0.2
NW Leicestershire	8.8	9.9	10.1	1.2	1.3
Oadby & Wigston	3.8	4.2	4.3	0.4	0.4
Leicester City	50.2	53.0	53.2	2.8	2.9
PUA	81.1	85.7	86.1	4.6	5.0
HMA	111.4	119.7	121.4	8.3	10.0

NB. May not sum due to rounding.
Source: Experian; PACEC

Industrial

G1.5 Industrial employment is forecast to decline by 2016 and 2026 across the HMA. By 2016 it is forecast around 6,600 jobs will be lost, and up to 2026 around 12,000 jobs will be lost. The bulk of these losses are forecast to be in Leicester City. Blaby is forecast to experience a small increase in industrial employment, with these increases mainly in construction and engineering sectors.

Table G1.4 Employment Forecasts, Industrial, 2007-2026, Jobs '000s

	2007	2016	2026	2007-2016	2007-2026
Blaby	8.8	9.2	10.5	0.4	1.7
Charnwood	18.9	18.1	17.6	-0.8	-1.3
Harborough	6.4	5.7	5.4	-0.7	-1.0
Hinckley & Bosworth	13.7	13.4	13.6	-0.3	0.0
Melton	6.1	5.9	5.6	-0.2	-0.5
NW Leicestershire	14.6	14.9	14.6	0.3	0.0
Oadby & Wigston	5.5	5.1	4.7	-0.4	-0.8
Leicester City	32.5	27.5	22.4	-4.9	-10.0
PUA	*65.7*	*60.0*	*55.2*	*-5.7*	*-10.5*
HMA	*106.5*	*99.9*	*94.5*	*-6.6*	*-12.0*

NB. May not sum due to rounding.
Source: Experian; PACEC

Warehousing

G1.6 Employment in warehousing overall is forecast to decline up to 2026 by around 800 jobs (with 200 lost by 2016). Growth forecast in North West Leicestershire (of 1,900 jobs) is forecast to be balanced out by losses of 1,900 jobs in Leicester City. Other districts are forecast to experience small changes in warehousing employment.

Table G1.5 Employment Forecasts, Warehousing, 2007-2026, Jobs '000s

	2007	2016	2026	2007-2016	2007-2026
Blaby	5.4	5.4	5.2	0.0	-0.2
Charnwood	4.9	4.7	4.4	-0.2	-0.5
Harborough	5.9	6.0	6.1	0.1	0.2
Hinckley & Bosworth	3.7	3.8	3.7	0.1	0.0
Melton	1.8	1.8	1.7	0.0	-0.1
NW Leicestershire	10.0	11.3	11.9	1.4	1.9
Oadby & Wigston	1.7	1.6	1.5	-0.2	-0.3
Leicester City	11.4	10.1	9.5	-1.3	-1.9
PUA	*23.5*	*21.7*	*20.7*	*-1.7*	*-2.8*
HMA	*44.8*	*44.7*	*44.0*	*-0.2*	*-0.8*

NB. May not sum due to rounding.
Source: Experian; PACEC

Step Two: Forecasts to Floorspace

Offices and Public Administration

G1.7 The table below sets out translating the change in employment to floorspace using standard employment densities. Around 180,000 sq.m. are forecast to be required to accommodate additional jobs up to 2026.

Table G1.6 Employment Forecasts and Floorspace Requirement, Offices and Public Administration, 2007-2026

	Change in jobs (000s)		Employment density, sq.m.	Change in floorspace, sq.m.	
	2007-2016	2007-2026		2007-2016	2007-2026
Blaby	0.9	1.2	18	15,360	21,562
Charnwood	0.6	0.4	18	10,475	8,061
Harborough	1.4	2.0	18	25,462	35,837
Hinckley & Bosworth	0.9	1.5	18	16,035	26,427
Melton	0.2	0.2	18	4,093	3,696
NW Leicestershire	1.2	1.3	18	20,809	23,014
Oadby & Wigston	0.4	0.4	18	7,326	8,007
Leicester City	2.8	2.9	18	49,643	52,888
PUA	*4.6*	*5.0*	*18*	*82,804*	*90,518*
HMA	*8.3*	*10.0*	*18*	*149,202*	*179,493*

NB. May not sum due to rounding.
Source: Experian; PACEC

Industrial

G1.8 Translating the change in employment into a floorspace requirement gives an overall fall of around 370,000 sq.m. up to 2026.

Table G1.7 Employment Forecasts and Floorspace Requirement, Industrial, 2007-2026

	Change in jobs (000s)		Employment density, sq.m.	Change in floorspace, sq.m.	
	2007-2016	2007-2026		2007-2016	2007-2026
Blaby	0.4	1.7	31	11,664	52,334
Charnwood	-0.8	-1.3	31	-24,234	-40,089
Harborough	-0.7	-1.0	31	-21,862	-30,940
Hinckley & Bosworth	-0.3	0.0	31	-8,569	-477
Melton	-0.2	-0.5	31	-4,992	-14,098
NW Leicestershire	0.3	0.0	31	8,787	55
Oadby & Wigston	-0.4	-0.8	31	-11,806	-25,919
Leicester City	-4.9	-10.0	31	-152,657	-311,528
PUA	*-5.7*	*-10.5*	*31*	*-177,033*	*-325,202*
HMA	*-6.6*	*-12.0*	*31*	*-203,669*	*-370,661*

NB. May not sum due to rounding.
Source: Experian; PACEC

Warehousing

G1.9 An overall loss of around 71,000 sq.m. for warehousing across Leicester and Leicestershire HMA up to 2026 comprises some increases and some declines across the districts. For example, North West Leicestershire is forecast

increases of 168,000 sq.m., whilst Leicester City is forecast a decline of 164,000 sq.m. up to 2026.

Table G1.8 Employment Forecasts and Floorspace Requirement, Warehousing, 2007-2026

	Change in jobs (000s)		Employm-ent density, sq.m.	Change in floorspace, sq.m.	
	2007-2016	2007-2026		2007-2016	2007-2026
Blaby	0.0	-0.2	88	-4,095	-16,036
Charnwood	-0.2	-0.5	88	-20,592	-43,340
Harborough	0.1	0.2	88	10,137	16,568
Hinckley & Bosworth	0.1	0.0	88	11,298	1,896
Melton	0.0	-0.1	88	-4,190	-11,875
NW Leicestershire	1.4	1.9	88	121,321	168,235
Oadby & Wigston	-0.2	-0.3	88	-14,069	-22,301
Leicester City	-1.3	-1.9	88	-113,701	-164,301
PUA	*-1.7*	*-2.8*	*88*	*-152,456*	*-245,978*
HMA	*-0.2*	*-0.8*	*88*	*-13,890*	*-71,154*

NB. May not sum due to rounding.
Source: Experian; PACEC

Step Three: Floorspace to Land

G1.10 The tables below translate the forecast floorspace to land. We undertake this only for industrial and warehousing floorspace at present; office employment is more easily understood in floorspace since there are wide divergences in plot ratios that may be applied, depending upon where the offices are built.

Industrial

G1.11 Translating the floorspace requirement into land gives an overall requirement for a loss of around 90ha up to 2026.

Table G1.9 Floorspace and Land Requirement, Industrial, 2007-2026

	Change in floorspace, sq.m.		Plot ratio	Change in land, ha	
	2007-2016	2007-2026		2007-2016	2007-2026
Blaby	11,664	52,334	4,200	2.8	12.5
Charnwood	-24,234	-40,089	4,200	-5.8	-9.5
Harborough	-21,862	-30,940	4,200	-5.2	-7.4
Hinckley & Bosworth	-8,569	-477	4,200	-2.0	-0.1
Melton	-4,992	-14,098	4,200	-1.2	-3.4
NW Leicestershire	8,787	55	4,200	2.1	0.0
Oadby & Wigston	-11,806	-25,919	4,200	-2.8	-6.2
Leicester City	-152,657	-311,528	4,200	-36.3	-74.2
PUA	*-177,033*	*-325,202*	*4,200*	*-42.2*	*-77.4*
HMA	*-203,669*	*-370,661*	*4,200*	*-48.5*	*-88.3*

NB. May not sum due to rounding.
Source: Experian; PACEC

Warehousing

G1.12 An overall loss of around 14 ha for warehousing across Leicester and Leicestershire HMA comprises some growth and some decline across the districts. For example, North West Leicestershire is forecast increases of 34 ha, whilst Leicester City is forecast a decline of 33 ha up to 2026.

Table G1.10 Employment Forecasts and Floorspace Requirement, Warehousing, 2007-2026

	Change in floorspace, sq.m.		Plot ratio	Change in land, ha	
	2007-2016	2007-2026		2007-2016	2007-2026
Blaby	-4,095	-16,036	5,000	-0.8	-3.2
Charnwood	-20,592	-43,340	5,000	-4.1	-8.7
Harborough	10,137	16,568	5,000	2.0	3.3
Hinckley & Bosworth	11,298	1,896	5,000	2.3	0.4
Melton	-4,190	-11,875	5,000	-0.8	-2.4
NW Leicestershire	121,321	168,235	5,000	24.3	33.6
Oadby & Wigston	-14,069	-22,301	5,000	-2.8	-4.5
Leicester City	-113,701	-164,301	5,000	-22.7	-32.9
PUA	*-152,456*	*-245,978*	*5,000*	*-30.5*	*-49.2*
HMA	*-13,890*	*-71,154*	*5,000*	*-2.8*	*-14.2*

NB. May not sum due to rounding.
Source: Experian; PACEC

Step Four: Renewal and Pipeline

G1.13 In this step we set out the estimate of floorspace and land required for renewal and pipeline in each of the Districts and the HMA as a whole. We set out

figures for the 'medium' scenario from Table 6.1. Offices floorspace is set out in square metres and industrial and warehousing land as hectares.

Offices and Public Administration

G1.14 Overall in Leicestershire and Leicester City we estimate 252,000 sq.m. of land will be required for renewal up to 2026, of which 126,000 sq.m. will be on new land.

Table G1.11 Floorspace requirement for renewal, Offices and Public Administration Floorspace, 2007-2016, 2026, sq.m.

	Stock	Development p.a.	Requirement to 2016	Requirement on new land to 2016	Requirement to 2026	Requirement on new land to 2026
Blaby	217,000	2,170	19,530	9,765	41,230	20,615
Charnwood	138,000	1,380	12,420	6,210	26,220	13,110
Harborough	75,000	750	6,750	3,375	14,250	7,125
Hinckley & Bosworth	77,000	770	6,930	3,465	14,630	7,315
Melton	60,000	600	5,400	2,700	11,400	5,700
NW Leicestershire	146,000	1,460	13,140	6,570	27,740	13,870
Oadby & Wigston	37,000	370	3,330	1,665	7,030	3,515
Leicester City	580,000	5,800	52,200	26,100	110,200	55,100
PUA	*972,000*	*9,720*	*87,480*	*43,740*	*184,680*	*92,340*
HMA	*1,330,000*	*13,300*	*119,700*	*59,850*	*252,700*	*126,350*

Source: PACEC, DCLG

Industrial

G1.15 Overall in Leicester and Leicestershire there is a requirement for renewal of around 195 ha, of which around 98 ha will be on 'new land'. Leicester City (34 ha), Charnwood (18 ha) and Hinckley and Bosworth (16ha) have the highest requirements for renewal on 'new land' as they currently have the highest levels of stock within the HMA.

Table G1.12 Land requirement for renewal, Industrial Floorspace, 2007-2016, 2026, ha

	Stock	Development p.a.	Requirement to 2016	Requirement on new land to 2016	Requirement to 2026	Requirement on new land to 2026
Blaby	75	0.6	5.1	2.5	10.7	5.3
Charnwood	257	1.9	17.4	8.7	36.7	18.3
Harborough	56	0.4	3.8	1.9	8.0	4.0
Hinckley & Bosworth	226	1.7	15.3	7.6	32.2	16.1
Melton	74	0.6	5.0	2.5	10.6	5.3
NW Leicestershire	140	1.1	9.5	4.7	20.0	10.0
Oadby & Wigston	64	0.5	4.3	2.2	9.1	4.5
Leicester City	476	3.6	32.1	16.1	67.8	33.9
PUA	*872*	6.5	58.9	29.4	124.3	62.1
HMA	*1,369*	10.3	92.4	46.2	195.1	97.5

Source: PACEC, DCLG

Warehousing

G1.16 Overall this amounts to a requirement for 170 ha of land for renewal of the existing stock, of which 128 ha are assumed to be on 'new land'. The largest requirements are in Harborough (31ha), Leicester City (29 ha) and North West Leicestershire (23 ha) as they currently have the highest levels of stock.

Table G1.13 Land requirement for renewal, Warehousing Floorspace, 2007-2016, 2026, ha

	Stock	Development p.a.	Requirement to 2016	Requirement on new land to 2016	Requirement to 2026	Requirement on new land to 2026
Blaby	84	0.8	7.6	5.7	16.0	12.0
Charnwood	81	0.8	7.3	5.5	15.4	11.5
Harborough	215	2.2	19.4	14.5	40.9	30.7
Hinckley & Bosworth	66	0.7	5.9	4.4	12.5	9.4
Melton	49	0.5	4.4	3.3	9.3	7.0
NW Leicestershire	164	1.6	14.7	11.1	31.1	23.3
Oadby & Wigston	31	0.3	2.8	2.1	5.9	4.4
Leicester City	206	2.1	18.6	13.9	39.2	29.4
PUA	402	4.0	36.2	27.2	76.5	57.3
HMA	896	9.0	80.7	60.5	170.3	127.7

Source: PACEC, DCLG

Total Requirement

G1.17 In this step we set out the estimate of floorspace and land required for renewal and pipeline in each of the Districts and HMA as a whole. We set out figures

for office floorspace in square metres and for industrial and warehousing land as hectares. The scenarios are set out in Appendix H.

G1.18 The total requirement for floorspace is calculated by adding:

- The change in the requirement for land resulting from forecast change in numbers of jobs over the plan period; and
- The requirement for new land resulting from the renewal of existing stock.

G1.19 For demand, where a negative requirement is identified e.g. if the area is predicted to suffer a decline in employment (e.g. industrial) over the plan period, we consider below solely the requirement from renewal on new land. This is because **new** land is required for renewal (by the definition set out in 6.1.14-6.1.23). Whilst jobs may be lost over the plan period, and therefore land may be stop being used for industrial purposes, this land is not likely to be taken up for renewal and therefore should not be included in the balance. This methodology also allows for unsuitable employment land to fall out of the employment land stock and be used for other, more suitable purposes whilst locating in a new, more appropriate location.

G1.20 Total requirements in each of the districts, City, PUA and HMA are set out in the tables below. Overall in the HMA there is a requirement for 306,000 sq.m. of office floorspace, 140 hectares of industrial land and 165 hectares of warehousing land. The majority of the office and industrial land requirement is for the PUA. The largest single requirement for warehousing floorspace is for North West Leicestershire, mainly for renewal of the existing stock.

Offices and Public Administration

G1.21 Around 305,000 sq.m. of floorspace are required up to 2026, of which the Principal Urban Area again forms around three fifths.

Table G1.14 Floorspace requirement for Offices and Public Administration, 2007-2016, 2026, sq.m.

	Change in floorspace		Requirement for renewal on new land		Total Requirement	
	2007-2016	2007-2026	2007-2016	2007-2026	Requirement to 2016	Requirement to 2026
Blaby	15,360	21,562	9,76	20,61	25,12	42,17
Charnwood	10,475	8,061	6,21	13,11	16,68	21,17
Harborough	25,462	35,837	3,37	7,12	28,83	42,96
Hinckley & Bosworth	16,035	26,427	3,46	7,31	19,50	33,74
Melton	4,093	3,696	2,70	5,70	6,79	9,39
NW Leicestershire	20,809	23,014	6,57	13,87	27,37	36,88
Oadby & Wigston	7,326	8,007	1,66	3,51	8,99	11,52
Leicester City	49,643	52,888	26,10	55,10	75,74	107,98
PUA	*82,804*	*90,518*	*43,74*	*92,34*	126,54	182,85
HMA	*149,202*	*179,493*	*59,85*	*126,35*	*209,05*	*305,84*

Source: PACEC

Industrial

G1.22 The situation with industrial land is more complicated. In many areas there is a forecast decline in the number of jobs in industrial sectors. In these cases, we include land purely for renewal. Overall in the HMA, around 88 ha are expected to be lost through declines in employment in the industry, but around 127 ha are expected to be required for renewal.

Table G1.15 Land requirement for Industrial, 2007-2016, 2026, ha

	Change in land		Requirement for renewal on new land		Total requirement	
	2007-2016	2007-2026	2007-2016	2007-2026	Requirement to 2016	Requirement to 2026
Blaby	2.	12.	2.	5.	5.	17.
Charnwood	-5.	-9.	8.	18.	8.	18.
Harborough	-5.	-7.	1.	4.	1.	4.
Hinckley & Bosworth	-2.	-0.	7.	16.	7.	16.
Melton	-1.	-3.	2.	5.	2.	5.
NW Leicestershire	2.	0.	4.	10.	6.	10.
Oadby & Wigston	-2.	-6.	2.	4.	2.	4.
Leicester City	-36.	-74.	46.1	63.9	46.	63.
PUA	-42.	-77.	59.	92.	62.	104.
HMA	-48.	-88.	76.	127.	81.	140.

* This includes an additional estimate a quarter of the 17 ha of employment land identified in Leicester City as no longer fit for purpose, and 26 ha for firms seeking to relocate from the intervention areas.
Source: PACEC

G1.23 Again, the forecasts for many of the districts show a declining requirement for employment land for warehousing resulting from declines in employment (14

ha reduction up to 2026 in the HMA). In these scenarios we only count land for renewal as part of the total requirement. Overall this shows a net requirement for around 165.1 ha in the HMA up to 2026, with 57.3 hectares in the PUA and 57.0 hectares in North West Leicestershire.

Table G1.16 Land requirement for Warehousing, 2007-2016, 2026, ha

	Change in land		Requirement for renewal on new land		Total requirement	
	2007-2016	2007-2026	2007-2016	2007-2026	Requirement to 2016	Requirement to 2026
Blaby	-0.8	-3.2	5.7	12.	5.7	12.0
Charnwood	-4.1	-8.7	5.5	11.	5.5	11.5
Harborough	2.0	3.3	14.5	30.	16.6	34.0
Hinckley & Bosworth	2.3	0.4	4.4	9.	6.7	9.8
Melton	-0.8	-2.4	3.3	7.	3.3	7.0
NW Leicestershire	24.3	33.6	11.1	23.	35.3	57.0
Oadby & Wigston	-2.8	-4.5	2.1	4.	2.1	4.4
Leicester City	-22.7	-32.9	13.9	29.	13.9	29.4
PUA	*-30.5*	*-49.2*	*27.2*	57.	*27.2*	*57.3*
HMA	*-2.8*	*-14.2*	*60.5*	127.	*89.1*	*165.1*

Source: PACEC

Appendix H Scenario Working, Supply Demand Balance

Leicester and Leicestershire HMA

Table H1.1 Leicester and Leicestershire HMA, Supply Demand Gap Analysis, 2007-2026

	Offices, sq.m.	Industrial, ha	Warehousing, ha
Medium			
Demand	305,843	140.0	165.1
Supply	398,012	206.7	78.9
Gap	92,169	66.7	-86.2
Effective Supply	326,372	137.4	78.9
Effective Gap	20,529	-2.6	-86.2
High			
Demand	337,431	172.5	197.0
Supply	398,012	206.7	78.9
Gap	60,581	34.2	-118.2
Effective Supply	326,372	137.4	78.9
Effective Gap	-11,059	-35.1	-118.2
Low			
Demand	274,256	107.5	133.1
Supply	398,012	206.7	78.9
Gap	123,756	99.2	-54.3
Effective Supply	326,372	137.4	78.9
Effective Gap	52,116	29.9	-54.3

Source: PACEC

PUA

Table H1.2 PUA, Supply Demand Gap Analysis, 2007-2026

	Offices, sq.m.	Industrial, ha	Warehousing, ha
Medium			
Demand	182,858	104.6	57.3
Supply	221,960	76.9	0.0
Gap	39,102	-27.7	-57.3
Effective Supply	221,960	60.9	0.0
Effective Gap	39,102	-43.7	-57.3
High			
Demand	205,943	125.3	71.7
Supply	221,960	76.9	0.0
Gap	16,017	-48.8	-71.7
Effective Supply	221,960	60.9	0.0
Effective Gap	16,017	-64.4	-71.7
Low			
Demand	159,773	83.9	43.0
Supply	221,960	76.9	0.0
Gap	62,187	-6.9	-43.0
Effective Supply	221,960	60.9	0.0
Effective Gap	62,187	-23.0	-43.0

Source: PACEC

Leicester City

Table H1.3 Leicester City, Supply Demand Gap Analysis, 2007-2026

	Offices, sq.m.	Industrial, ha	Warehousing, ha
Medium			
Demand	107,988	63.9	29.4
Supply	91,960	24.7	0.0
Gap	-16,028	-39.3	-29.4
Effective Supply	91,960	24.7	0.0
Effective Gap	-16,028	-39.3	-29.4
High			
Demand	121,763	75.2	36.7
Supply	91,960	24.7	0.0
Gap	-29,803	-50.6	-36.7
Effective Supply	91,960	24.7	0.0
Effective Gap	-29,803	-50.7	-36.7
Low			
Demand	94,213	52.6	22.0
Supply	91,960	24.7	0.0
Gap	-2,253	-28.0	-22.0
Effective Supply	91,960	24.7	0.0
Effective Gap	-2,253	-28.0	-22.0

Source: PACEC

Blaby

Table H1.4 Blaby, Supply Demand Gap Analysis, 2007-2026

	Offices, sq.m.	Industrial, ha	Warehousing, ha
Medium			
Demand	42,177	17.8	12.0
Supply	61,700	6.0	0.0
Gap	19,523	-11.8	-12.0
Effective Supply	61,700	6.0	0.0
Effective Gap	19,523	-11.8	-12.0
High			
Demand	47,330	19.6	15.0
Supply	61,700	6.0	0.0
Gap	14,370	-13.6	-15.0
Effective Supply	61,700	6.0	0.0
Effective Gap	14,370	-13.6	-15.0
Low			
Demand	37,023	16.0	9.0
Supply	61,700	6.0	0.0
Gap	24,677	-10.0	-9.0
Effective Supply	61,700	6.0	0.0
Effective Gap	24,677	-10.0	-9.0

Source: PACEC

Charnwood

Table H1.5 Charnwood, Supply Demand Gap Analysis, 2007-2026

	Offices, sq.m.	Industrial, ha	Warehousing, ha
Medium			
Demand	21,171	18.3	11.5
Supply	68,300	41.8	0.0
Gap	47,129	23.5	-11.5
Effective Supply	68,300	28.9	0.0
Effective Gap	47,129	10.6	-11.5
High			
Demand	24,449	24.5	14.4
Supply	68,300	41.8	0.0
Gap	43,851	17.4	-14.4
Effective Supply	68,300	28.9	0.0
Effective Gap	43,851	4.5	-14.4
Low			
Demand	17,894	12.2	8.6
Supply	68,300	41.8	0.0
Gap	50,406	29.6	-8.6
Effective Supply	68,300	28.9	0.0
Effective Gap	50,406	16.7	-8.6

Source: PACEC

Oadby & Wigston

Table H1.6 Oadby & Wigston, Supply Demand Gap Analysis, 2007-2026

	Offices, sq.m.	Industrial, ha	Warehousing, ha
Medium			
Demand	11,522	4.5	4.4
Supply	0	4.4	0.0
Gap	-11,522	-0.1	-4.4
Effective Supply	0	1.3	0.0
Effective Gap	-11,522	-3.2	-4.4
High			
Demand	12,401	6.1	5.5
Supply	0	4.4	0.0
Gap	-12,401	-1.6	-5.5
Effective Supply	0	1.3	0.0
Effective Gap	-12,401	-4.7	-5.5
Low			
Demand	10,643	3.0	3.3
Supply	0	4.4	0.0
Gap	-10,643	1.5	-3.3
Effective Supply	0	1.3	0.0
Effective Gap	-10,643	-1.7	-3.3

Source: PACEC

Harborough

Table H1.7 Harborough, Supply Demand Gap Analysis, 2007-2026

	Offices, sq.m.	Industrial, ha	Warehousing, ha
Medium			
Demand	42,962	4.0	34.0
Supply	67,490	21.1	1.1
Gap	24,528	17.1	-32.9
Effective Supply	54,290	11.7	1.1
Effective Gap	11,328	7.7	-32.9
High			
Demand	44,743	5.4	41.7
Supply	67,490	21.1	1.1
Gap	22,747	15.8	-40.6
Effective Supply	54,290	11.7	1.1
Effective Gap	9,547	6.3	-40.6
Low			
Demand	41,181	2.7	26.3
Supply	67,490	21.1	1.1
Gap	26,309	18.5	-25.2
Effective Supply	54,290	11.7	1.1
Effective Gap	13,109	9.0	-25.2

Source: PACEC

Hinckley & Bosworth

Table H1.8 Hinckley & Bosworth, Supply Demand Gap Analysis, 2007-2026

	Offices, sq.m.	Industrial, ha	Warehousing, ha
Medium			
Demand	33,742	16.1	9.8
Supply	0	24.8	21.2
Gap	-33,742	8.7	11.5
Effective Supply	0	12.1	21.2
Effective Gap	-33,742	-4.0	11.5
High			
Demand	35,571	21.5	12.1
Supply	0	24.8	21.2
Gap	-35,571	3.4	9.1
Effective Supply	0	12.1	21.2
Effective Gap	-35,571	-9.3	9.1
Low			
Demand	31,914	10.7	7.4
Supply	0	24.8	21.2
Gap	-31,914	14.1	13.8
Effective Supply	0	12.1	21.2
Effective Gap	-31,914	1.4	13.8

Source: PACEC

Melton

Table H1.9 Melton, Supply Demand Gap Analysis, 2007-2026

	Offices, sq.m.	Industrial, ha	Warehousing, ha
Medium			
Demand	9,396	5.3	7.0
Supply	8,920	32.4	0.0
Gap	-476	27.1	-7.0
Effective Supply	8,920	1.4	0.0
Effective Gap	-476	-3.9	-7.0
High			
Demand	10,821	7.1	8.7
Supply	8,920	32.4	0.0
Gap	-1,901	25.3	-8.7
Effective Supply	8,920	1.4	0.0
Effective Gap	-1,901	-5.7	-8.7
Low			
Demand	7,971	3.5	5.2
Supply	8,920	32.4	0.0
Gap	949	28.9	-5.2
Effective Supply	8,920	1.4	0.0
Effective Gap	949	-2.2	-5.2

Source: PACEC

North West Leicestershire

Table H1.10 North West Leicestershire, Supply Demand Gap Analysis, 2007-2026

	Offices, sq.m.	Industrial, ha	Warehousing, ha
Medium			
Demand	36,884	10.0	57.0
Supply	99,642	51.4	56.5
Gap	62,758	41.4	-0.5
Effective Supply	41,202	51.4	56.5
Effective Gap	4,318	41.4	-0.5
High			
Demand	40,351	13.3	62.8
Supply	99,642	51.4	56.5
Gap	59,591	38.1	-6.3
Effective Supply	41,202	51.4	56.5
Effective Gap	851	38.1	-6.3
Low			
Demand	33,416	6.7	51.2
Supply	99,642	51.4	56.5
Gap	66,226	44.7	5.4
Effective Supply	41,202	51.4	56.5
Effective Gap	7,786	44.7	5.4

Source: PACEC

Appendix I Report of Stakeholders' Workshop

I1 Introduction

I1.1 As part of the programme of involving stakeholders in the review, Kishor Tailor, Chief Executive of Leicester Shire Economic Partnership, chaired a workshop on 9th June 2008 at the Walker's Stadium, Leicester. At the seminar the consultants briefed **N** representatives of landowners, developers, property service companies and local authorities on the main findings and ideas emerging from the review. The main findings arose from the supply and demand gap analysis and ideas were informed by the need to plan for a low carbon era. Stakeholders were then invited to debate four employment land planning issues arising from the proposal for a new pattern of low carbon development in: the New Business Quarter; Sustainable Urban Extensions; Science Parks; market towns and road – rail strategic distribution centres. The main messages arising from these discussions are summarised below:

I2 i) Future Proofing for Sustainable Development:

I2.1 This group considered policy measures needed to deliver the New Business Quarter and Sustainable Urban Extensions as locations for more environmentally sustainable development.

I2.2 For the New Business Quarter, current car parking standards were seen as a constraint on demand. The difficulty of delivering on site renewable energy generation in a city centre location was seen as a constraint on developers.

I2.3 Turning to the Sustainable Urban Extensions, the stakeholders referred to policy approaches elsewhere in the UK. In Ashford, policies are seeking to link employment, housing and public transport. In Wellingborough an employment led approach is being taken to align jobs with homes. Reference was also made to water cycle strategies and the need to plan to reduce per capita water consumption by 50%.

I2.4 To sum up, the group gave its support for low carbon development: low energy buildings in locations where access is predominantly by sustainable modes of transport. However it acknowledged that decisions takers will be among the last to use cars. Subject to car parking standards reflecting this reality, there is a case for a further office allocation in the New Business Quarter.

I3 ii) Public Sector Supply Side Roles:

I3.1 This group considered possible public sector interventions to deliver low carbon development.

I3.2 In discussing the New Business Quarter, the stakeholders recognised the attractiveness of central locations and rail links to London but noted that the

need for better public transport links to the city centre: park and ride and express buses and more local railway stations.

I3.3 The group also suggested car parking standards have created a moral hazard: they have stimulated demand for car dependent office – of – town office schemes. A review of the standards is needed to stimulate demand for city centre office schemes which can be accessed by sustainable modes of transport.

I3.4 In parallel measures are required to free up the Leicester industrial property market. Two key measures were proposed: to bring forward sites for development and hence free up existing space and refurbishing vacant space for reuse by among others firms relocating from of the intervention areas. For these measures to succeed, robust planning policies will be required to protect the existing stock from higher value uses such as housing.

I3.5 The stakeholders stressed the importance of employment schemes front loading sustainable urban extensions to create demand for homes and help establish patterns of short distance commuting.

I3.6 The group concluded that it would be difficult for the private sector to act alone in the delivery of Sustainable Urban Extensions. This called for a clear public sector policy framework and structures to plan and co – ordinate investment in infrastructure for housing, employment and transport.

I3.7 Public sector investment though would need to comply with EU state aid rules and should not be used to subsidise development for which there is no prospective market demand. The Science Park schemes were cited as possible examples of such subsidies.

I4 iii) Market Perspectives on Supply:

I4.1 The group considered issues with the existing stock and constraints on future supply.

I4.2 Beginning with Leicester the stakeholders noted the constraint on car parking was not complemented by high quality public transport provision. As a result the city lacked high quality offices and firms were taking up space in out of town locations. In addition to the poor stock of offices, the city lacks industrial space.

I4.3 The stakeholders viewed Sustainable Urban Extensions to be the key to future supply but a clear public policy framework and infrastructure investment package would be required to enable private investment.

I4.4 Support was voiced for road – rail strategic distribution centres as they would mitigate demand for road space.

I4.5 Whilst the need to identify large employment land allocations was acknowledged, the role of small scale schemes in rural locations should not be overlooked as part of an overall pattern of sustainable development.

I5 iv) Market Perspectives on Demand:

I5.1 The group considered businesses' employment land and property requirements.

I5.2 The stakeholders' central concerns were the cost burden of low carbon development, the effect of these costs on international competitiveness and the need for more market intelligence.

I5.3 On the first point, it was questioned whether firms could afford the additional capital and rental costs to pay for higher construction costs.

I5.4 On the second point, it was felt that high environmental standards put UK firms at a cost disadvantage firms in countries without such standards.

I5.5 In response to these points it was argued that rising fuel prices would make lower carbon building a source of cost advantage and competitiveness.

I5.6 On the third point, a call was made to emda, LSEP and Invest Leicestershire to feedback more intelligence to the market: which interventions have succeeded and which have not; which enquiries have translated into deals and why have those companies invested in the sub region?

Appendix J Full Supply Demand Gap Analysis Tables

Table J1.1 Proposed employment land allocations to 2026

	Offices	Light industrial and small warehousing	Strategic warehousing
PUA	46,000 sq m	100 ha	0
Leicester City	60,000 sq m	9.3 ha	0
Charnwood			
North SUEs	← 20 ha →		0
South SUEs	0	50 ha	0
Blaby			
Blaby SUEs	0	24 ha	0
Oadby & Wigston	5,800 sq m	0	0
PUA total	65,800 sq m	103.3 ha	0
Rest of Leicestershire			
NW Leicestershire			
Coalville SUEs	← 20-25 ha →		0
Rail-linked	0	0	50 ha
Hinckley & Bosworth			
	6 ha (34,000 sq m)	14 ha	0
SUEs	← 20-25 ha →		0
Harborough	0	0	0
Melton	2 ha (500 sq m)	11 ha	0
Total	Min 100,300 sq m	Max 178.3 ha	50 ha

NB. May not sum due to rounding.
Source: Experian; PACEC

Leicester City

Table J1.2 Leicester City office supply and demand gap analysis, 2007-2026

	Sq.m.
Total additional requirement	**107,988**
Supply - Allocations and consents	**91,960**
NBQ Phases 1 (Int House, Spread Eagle) and Phase 2	47,200
Abbey Meadows Science Park (B1b)	44,000
Conduit Street, Fara Estate	760
GAP	***-16,028***

Source: PACEC

Table J1.3 Leicester City industrial supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**63.9**
Supply - Allocations & consents	**24.7**
Fairway Business Park	6.0
Gipsy Lane Brickworks, Victoria Road East	3.0
Lewisher Road	2.4
Gipsy Lane, Brickworks, Victoria Road East	2.1
Mountain, Road/Barkbythorpe Road, Troon Industrial Area	2.1
Ashton Business Park (Bursom), Hoods Close	2.1
Syston Street East, Humberstone Sidings	1.3
Barkby Road	1.4
Uxbridge Road, Land to the south	1.2
Harrington Street & Ulverscroft Road	0.6
Nedham Street, Lesta Packaging plc	0.5
Sanvey Gate (adj. Joiners Arms PH)	0.4
Langham Road	0.4
Waterside Road, Hamilton Industrial Park	0.4
Gorse Hill, Boston Road, Gorse Hill Industrial Estate Part, Plot 4	0.3
Langham Road	0.2
Humberstone Road, Nedham Street	0.2
Sanvery Gate, Adjacent 25 Pasture Lane	0.1
GAP	**-39.3**

Source: PACEC

Table J1.4 Leicester City warehousing supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**29.4**
Supply - Allocations & consents	**0.0**
GAP	***-29.4***

Source: PACEC

Blaby

Offices

Table J1.5 Blaby office supply and demand gap analysis, 2007-2026

	sq.m.
Total additional requirement	**42,177**
Supply - Allocations & consents	**61,700**
Carlton Park	35,480
Grove Park	16,700
Kirby Park Farm	9,520
GAP	***19,523***

Source: PACEC

Table J1.6 Blaby industrial supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**17.8**
Supply - Allocations & consents	**6.0**
Quarry Lane, Enderby	3.6
Land adjacent Couture Marketing, Station Road, Stoney Stanton	0.7
Warrens Industrial Estate, Mill Hill Industrial Estate, Enderby	0.6
Whetstone Pastures Farm, Whetstone	0.5
Feldspar Close, Plot E unit 2, Warrens Industrial Area	0.5
Highfields Enterprise Zone, Stoney Stanton	0.1
GAP	***-11.8***

Source: PACEC

Table J1.7 Blaby warehousing supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**12.0**
Supply – Allocations & consents	**0**
GAP	***-12.0***

Source: PACEC

Charnwood

Table J1.8 Charnwood office supply and demand gap analysis, 2007-2026

	Sq.m.
Total additional requirement	**21,171**
Supply - Allocations & consents	**68,300**
Loughborough Science Park Phase 2 (B1b)	43,000
Watermead Business Park	21,600
Dishley Grange	3,700
GAP	***47,129***

Source: PACEC

Table J1.9 Charnwood industrial supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**18.3**
Supply - Allocations & consents	**41.8**
Land at Dishley Grange, Hathern	19.1
Harrowgate Drive (Hallamfields), Birstall	6.0
Rothley Lodge	5.9
The Warren, East Goscote	4.8
Loughborough Industrial Park, Weldon Road, Loughborough	3.4
251 Loughborough Road (Granite Way), Mountsorrel	1.2
Burder Street Regeneration, Loughborough	0.9
North Road, Loughborough	0.5
GAP	***23.5***
Unsuitable sites/ sites unlikely to come forward	
Burder Street Regeneration, Loughborough	-0.9
Land at Dishley Grange, Hathern	-12.0
Effective Supply	**28.9**
EFFECTIVE GAP	***10.6***

Source: PACEC

Table J1.10 Charnwood warehousing supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**11.5**
Supply – Allocations & consents	**0**
GAP	***-11.5***

Source: PACEC

Oadby & Wigston

J1.2 Oadby & Wigston currently has no office supply identified. However, masterplans have identified potential for 1,125 sq m of offices in Oadby town centre and 4,675 sq m of offices in Wigston town centre.

Table J1.11 Oadby & Wigston office supply and demand gap analysis, 2007-2026

	Sq.m.
Total additional requirement	**11,522**
Supply - Allocations & consents	**0**
GAP	***-11,522***

Source: PACEC

J1.3 If Wigston Railway Triangle is excluded from demand, there may be a shortfall of land for renewal of existing industrial and warehousing sites in Oadby & Wigston.

Table J1.12 Oadby & Wigston industrial supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**4.5**
Supply - Allocations & consents	**4.5**
Wigston Railway Triangle	3.1
Sports field off Tiger's Road, South Wigston	0.8
Land West of Magna Road, Magna Industrial Estate	0.6
GAP	***-0.1***
Unsuitable sites/sites unlikely to come forward	
Wigston Railway Triangle	-3.1
Effective Supply	**1.4**
Effective Gap	***-3.2***

Source: PACEC

Table J1.13 Oadby & Wigston warehousing supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**4.4**
Supply - Allocations & consents	**0.0**
GAP	***-4.4***

Source: PACEC

Harborough

Table J1.14 Harborough office supply and demand gap analysis, 2007-2026

	Sq.m.
Total additional requirement	**42,962**
Supply - Allocations & consents	**67,490**
GAP	***24,528***
Unsuitable sites/ sites unlikely to come forward	
South of Coventry Road (Leaders Farm), Lutterworth	-13,200
Effective supply	***54,290***
Effective GAP	***11,328***

Source: PACEC

Table J1.15 Harborough industrial supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**4.0**
Supply - Allocations & consents	**21.1**
Airfield Farm, Leicester Road, Market Harborough	3.3
East of Rockingham Road, Market Harborough	2.9
Railway Goods Yard, Rockingham Road	2.8
Station Road, Husbands Bosworth	2.6
Nursery Site, Riverside, Market Harborough	2.0
East of Rockingham Road, Market Harborough	2.0
West of Northampton Road, Market Harborough	1.8
Land at Great House Lane, Great Easton	1.0
Land off Marlborough Drive, Fleckney	0.7
Riverside Market Harborough	0.5
Hope Farm, Main Street, Hungarton	0.4
Land at Sutton Farm, Leicester Road	0.3
Sibertoft Road, Husbands Bosworth	0.3
Kettering Road/Rockingham Road, Market Harborough	0.3
Bruntingthorpe Industrial Estate	0.1
Stanford Hall, Stanford Park, Westrill and Starmore	0.1
GAP	***17.1***
Unsuitable sites/ sites unlikely to come forward	
West of Northampton Road, Market Harborough	-1.8
East of Rockingham Road, Market Harborough ("Peaker Park")	-2.0
East of Rockingham Road, Market Harborough	-2.9
Railway Goods Yard, Rockingham Road, Market Harborough	-2.8
Effective supply	**11.7**
Effective GAP	***7.7***

Source: PACEC

Table J1.16 Harborough warehousing supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**34.0**
Supply - Allocations & consents	**1.1**
Airfield Farm (part)	1.1
GAP	***-32.9***

Source: PACEC

Hinckley & Bosworth

Table J1.17 Hinckley & Bosworth office supply and demand gap analysis, 2007-2026

	Sq.m.
Total additional requirement	**33,742**
Supply - Allocations & consents	**0**
GAP	***-33,742***

Source: PACEC

Table J1.18 Hinckley & Bosworth industrial supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**16.1**
Supply - Allocations & consents	**24.8**
MIRA, Higham on the Hill	9.0
Land North of Coventry Road, Hinckley	4.7
Rear of Sketchley Works, Rugby Road, Hinckley	3.9
Rear Jarvis, Coventry Road, Hinckley	3.7
A5 Watling Street, Nutts Lane, Hinckley	2.3
Barwell Business Centre, Barwell	0.4
Wheatfield Way, Hinckley Fields Industrial Estate	0.3
Stephenson Road, Harrowbrook Industrial Estate, Hinckley	0.3
Unit B, Warwick Buildings, Rossendale Road	0.1
GAP	***8.7***
Unsuitable sites/sites unlikely to come forward	
MIRA, Higham on the Hill	-9.0
Rear Jarvis, Coventry Road, Hinckley	-3.7
Effective Supply	**12.1**
Effective GAP	***-4.0***

Table J1.19 Hinckley & Bosworth warehousing supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**9.8**
Supply - Allocations & consents	**21.2**
Nailstone Colliery	20.0
Interlink Distribution Park, Stanton near Bardon	1.2
GAP	***11.5***

Source: PACEC

Melton

Table J1.20 Melton office supply and demand gap analysis, 2007-2026

	Sq.m.
Total additional requirement	**9,396**
Supply - Allocations & consents	**8,920**
Leicester Road	8,920
GAP	***-476***

Source: PACEC

Table J1.21 Melton industrial supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**5.3**
Supply - Allocations & consents	**32.4**
Asfordby Business Park, Asfordby	16.0
Holwell Works, Asfordby Hill	15.0
Normanton Lane, Bottesford	0.7
John O Gaunt Industrial Estate, Somerby	0.4
Charlotte Street, Melton Mowbray	0.2
Pedigree Petfoods Ltd, Mill Road, Melton Mowbray	0.1
GAP	***27.1***
Unsuitable sites/sites unlikely to come forward	
Asfordby Business Park, Asfordby	-16.0
Holwell Works, Asfordby Hill	-15.0
Effective Supply	**1.4**
Effective GAP	***-3.9***

Source: PACEC

Table J1.22 Melton warehousing supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**7.0**
Supply - Allocations & consents	**0.0**
GAP	***-7.0***

Source: PACEC

North West Leicestershire

Table J1.23 North West Leicestershire office supply and demand gap analysis, 2007-2026

	Sq.m.
Total additional requirement	**36,884**
Supply - Allocations & consents	**99,642**
Pegasus Business Park	58,440
Willow Farm	17,480
Ashby Business Park	12,760
Stardust, Bardon (windfall)	5,574
Ivanhoe Business Park	5,388
GAP	***62,758***
Unsuitable sites/sites unlikely to come forward	
Pegasus Business Park	-58,440
Effective supply	**41,202**
Effective GAP	***4,318***

Source: PACEC

Table J1.24 North West Leicestershire industrial supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**10.0**
Supply - Allocations & consents	**51.4**
Extension to Westminster Estate, Measham	11.8
Off Citrus Grove, Kegworth	6.1
Land at Swain Park, Albert Village	5.0
Moira Road, Woodville Woodlands	4.8
Hilltop, Bardon	4.1
Ashby Business Park	3.9
Ivanhoe Business Park, Ashby	3.3
Forest Business Park (also known as Bardon Lodge), Coalville	2.7
Stephenson Industrial Estate	2.7
Langham Park, Castle Donington	1.7
Site off Long Lane, Kegworth	1.1
Spring Cottage/Former Rawdon Colliery, Moira	1.0
Whitwick Business Park	1.0
Bardon Hall, Coalville	0.8
Flagstaff 42	0.7
South of Tournament Way	0.5
Off Vulcan Way, Coalville	0.3
GAP	***41.4***

Source: PACEC

Table J1.25 North West Leicestershire warehousing supply and demand gap analysis, 2007-2026

	Ha
Total additional requirement	**57.0**
Supply - Allocations & consents	**56.5**
East Midlands Distribution Centre (Previously Castle Donnington Power Station Site)	38.5
Interlink (also known as Battleflat)	14.0
Ivanhoe Business Park	4.0
GAP	***-0.5***

Source: PACEC

Appendix K Initial and Second Site Assessments of Sites Nominated for Employment Development

K1 Key to Scoring Categories

K1.1 Each criterion has been assigned a sliding score of 1 – 5 with 5 representing the best circumstances in relation to the site being identified as suitable for employment development and that development contributing to sustainability and wider strategic policy objectives. Each is to be assessed in the context of its proposed/ likely function, i.e as a strategic freight and distribution centre, science park, offices or open use (light and general industry and small scale warehousing).

CRITERIA AND SCORING REGIME FOR THE INITIAL ASSESSMENT OF SITES NOMINATED FOR EMPLOYMENT DEVELOPMENT

Environmental Constraints: Pass or Fail		
	Pass	**Fail**
Flood risk (in zones 2 and 3)		
Protected Green Belt		
Conservation Area (employment proposal of appropriate scale and design)		
Proximity to listed building, ancient monument (as above)		
SSSI or other sensitive nature conservation sites		
Other constraints		

Continue to score sites which pass the above constraints.

Sequential Test					
	Score 1	**Score 2**	**Score 3**	**Score 4**	**Score 5**
Principal Urban Area	Elsewhere				Within existing urban area or potential Sustainable Urban Extension

Rest of Leicestershire	Rural Area	Village centre			Within existing urban area or potential Sustainable Urban Extension

Accessibility Test					
	Score 1	**Score 2**	**Score 3**	**Score 4**	**Score 5**
Accessibility by workforce	Population of less than 10,000 within 3 km radius of the site	Population of between 10,000 and 25,000 within 3 km radius of the site			Population of 25,000 or more within 3 km radius of the site
Accessibility by sustainable modes	No existing access by foot, cycle, bus and/or train services		Existing footways, on-road cycle, bus and other train services less than 3 times per hour		Existing high quality access by foot, cycle path, bus and/or train services 4 or more times per hour

Policy Factors					
	Score 1	**Score 2**	**Score 3**	**Score 4**	**Score 5**
Sustainable buildings (level of carbon emissions)	Low potential to design for passive heating and cooling, and on-site renewable energy generation		Average potential to design for passive heating and cooling, and on-site renewable energy generation		High potential to design for passive heating and cooling, and on-site renewable energy generation
Sustainable travel patterns	Low potential to reduce the need to travel and improve access by foot, bicycle and public				High potential to maximise opportunities to reduce the need to travel and improve access by

	transport				foot, bicycle and public transport
Sustainable economic development (score a) and then either b), c) or d))					
a) Responsive to market needs	Least attractive to investor, priority sector and small business needs		Quite attractive to investor, priority sector and small business needs		Most attractive to investor, priority sector and small business needs
b) Urban regeneration and planned growth	On previously undeveloped land				Priority urban regeneration area or Sustainable Urban Extension
c) Rural diversification	Inappropriate scale, inconsistent with policy of urban concentration				Appropriate scale, consistent with policy of urban concentration
d) Road-rail strategic distribution	Does not meet any RSS criteria for growth in rail-based freight		Meets the two major RSS criteria (site area and W10 or W12 rail gauge) subject to investment		Meets major and minor RSS criteria for growth in rail-based freight

Select for taking forward for the second stage of assessment the highest scoring sites that fit into the identified 'gap' in provision by property type (market segment) and location (market area).

CRITERIA AND SCORING REGIME FOR THE SECOND ASSESSMENT OF SITES NOMINATED FOR EMPLOYMENT DEVELOPMENT

Market Attractiveness Factors					
	Score 1	**Score 2**	**Score 3**	**Score 4**	**Score 5**
Defines ownership issues	Site owned landowner(s) who are unwilling to either sell	Site subject to long term site assembly problem	Some land ownership issues but subject to	Single owner with minor legal issues, for	Public or private owners with developer

	or develop or subject to ransom strips		negotiation by willing parties	example unsigned S 106 agreement	committed to early development
Defines on site constraints	Severe land contamination and or ground stability issues	Problematic land contamination and or ground stability issues	Some land remediation required	Minor land remediation required	No land remediation required
Defines utility infrastructure constraints: Water, sewage, drainage, electricity, gas and broadband	Site subject to development embargo due to costs of increasing capacity	Substantial off and on site infrastructure improvements required	Some infrastructure improvements required	Capacity constraints defined, costed and affordable	No constraints on capacity
Defines highway infrastructure constraints	Capacity constraints on site access, subject to Transport Assessment	Substantial off site highway capacity improvements required	Some additional highway improvement works required	Usual site access and service road(s) required	Site access in place
Defines potential and current market interest in the site for B1, 2 or 8 uses	Site subject of recent planning application(s)	Site subject of active marketing for employment development	Site subject of either recent funding, land sale or pre let deal	Site clearance and preparation either completed or underway	Development either recently completed or under construction on part of the site

Sustainable Development Factors					
	Score 1	**Score 2**	**Score 3**	**Score 4**	**Score 5**
Defines flood risk	EA map predicts more than 50% of site at 1 in 100 risk	EA map predicts less than 50% of site at 1 in 100 risk	EA map predicts more than 50% of site at 1 in 1000 risk	EA map predicts less than 50% of site at 1 in 1000 risk	EA map predicts no risk
Defines accessibility by foot and cycle	No footways or cycles paths linking substantial residential areas with the site	Uncoordinated footways and cycle paths that do not conveniently link with	One basic footway and cycle path between a residential area and the site	Two safe and well maintained footways and cycle paths between residential	Three or more safe and well maintained footways and cycle

		residential areas or may be subject of safety issues		areas and the site	paths between residential areas and the site
Defines accessibility by public transport	No bus stops or railway station within 800 m of the site	Bus or train frequency for all stops within 800 m is less than hourly, ie 12 scheduled calls between 06.00 – 18.00 Monday to Saturdays	Bus or train frequency for all stops within 800 m is hourly ie 13 scheduled calls between 06.00 – 18.00 Monday to Saturdays	Bus frequency for all stops within 800 m is half hourly ie 26 scheduled calls between 06.00 – 18.00 Monday to Saturdays	a) Bus frequency for all stops within 800 m is 15 minutes or more ie 56 or more scheduled calls between 06.00 – 18.00 Monday to Saturdays
Defines accessibility to local facilities	No facilities within 800 metres	Small shopping parade within 800 metres	Local centre within 800 metres	District or town centre within 800 metres	District or town centre within 600 metres
Defines easy and appropriate accessibility to highway network	Access by HGVs subject to restrictions and need for inconvenient alternative routes	Access by cars and HGVs generates unacceptable environmental impacts on residential areas, congestion and air quality	Access by cars and HGVs generates some environmental impacts on residential areas, congestion and air quality	Access by cars and HGVs accommodated on appropriate A and Trunk roads	B 8: Linked to rail and motorway access

Strategic Planning Factors					
	Score 1	**Score 2**	**Score 3**	**Score 4**	**Score 5**
Defines site's strategic locational importance to the delivery of the RSS/ RES	In a rural area	In village centre			In existing built up area, potential SUE or strategic distribution road/rail site
Will the site contribute to sustainable development?	Does not contribute either to a) regeneration of		Local level contribution to either a)		HMA-level contribution to either a) regeneration of priority urban renewal areas, b) part of a low

	priority urban renewal areas, b) part of a low carbon exemplar scheme or c) growth in rail-based freight.		regeneration of priority urban renewal areas, b) part of a low carbon exemplar scheme or c) growth in rail-based freight.		carbon exemplar scheme or c) growth in rail-based freight.
Will the site contribute to sustainable development?	Does not maximise existing investment in infrastructure, provides best possible access to services, facilities and jobs.				Maximises existing investment in infrastructure, provides best possible access to services, facilities and jobs.
Will the site contribute to sustainable economic development?	Site is within an area of over-supply or low market demand.		Site will improve either the regeneration of urban areas or promote the diversification of the rural economy.		Site is identified for a specific use within a priority sector.
Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on – site constraints to make employment development viable?	No		Funding support is being considered		Funding is committed as a strategic priority

Select the highest scoring sites for more detailed discussions with land owners and developers and consideration as options for preferred locations of growth.